

PERSONAL TAX CHECKLIST TAX YEAR 2019

| FULL NAME | | | | SIN | | | | |
|--|--|---|---------------------------------------|--------------------------|--|--|--|---|
| ADDRESS | | | | | | | | |
| DATE OF BIRTH | EMAIL PHONE NUMBER | | | | | | | |
| MARITAL STATUS | | | | PHONE | NE NUMBER | | | |
| | | eparated, widowed, comi | non-law (| or marrie | rd. | | | |
| married or common-law, provide details below. SPOUSE/COMMON LAW NAME | | | SIN | | | DATE OF BIRTH | | INCOME FO 2019 |
| | | | | | | | | |
| DEPENDANT'S NAME | | RELATIONSHIP | SIN | | | DATE OF BIRTH | | INCOME FO |
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| and an Diana | id 20 | 10 Nation of management | | | | | | |
| | - | 18 Notice of assessment | | | | | | |
| | | | | | | | | |
| Are you a Canadian | | | | | | | Yes | No |
| If a Canadian Citize | n, do you auth | norize CRA to give your na | | | of birth an | d | Yes Yes | No |
| If a Canadian Citize | n, do you auth | norize CRA to give your na or the National Register of | | | of birth an | d | | |
| If a Canadian Citize citizenship to Electi | n, do you auth ions Canada fo | | Electors? |) | | d | | |
| If a Canadian Citize citizenship to Electi | n, do you auth ions Canada fo ign property a | or the National Register of | Electors? | of \$100,0 | 000? | d | Yes | No |
| If a Canadian Citize citizenship to Electi | n, do you auth ions Canada fo ign property a | or the National Register of t any time in 2019 with a | Electors? | of \$100,0 | 000? | d | Yes | No |
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workers compensation, etc.)

| DEDUCTIONS/CREDITS – DID YOU: | YES | NO | IF YES, PLEASE SEND: | |
|--|-----|----|--|--|
| Contribute to or roll over eligible income to an RRSP | | | RRSP slips / Tax receipts | |
| Pay interest on your student loan in the current year or | | | Interest statements | |
| in prior years and have not claimed it | | | interest statements | |
| Pay union or professional dues | | | Tax receipts | |
| Incur moving expenses to move at leat 40 kms closer to | | | Details and receipts | |
| work or school | | | Details and receipts | |
| Pay or receive alimony or maintenance support pursuant to a court order or written agreement | | | Copy of agreement and details | |
| | | | copy of agreement and details | |
| Pay child care expenses so you could work or attend | | | Details and receipts | |
| school | | | betails and receipts | |
| Incur expenses to earn investment income | | | Details and receipts | |
| Make charitable or political contributions | | | Tax receipts | |
| You, your spouse or dependent child become disable | | | Form T2201 completed by your physician | |
| Pay for medical or dental expenses for which you were | | | | |
| not reimbursed or for premiums for extended medical | | | List of expenses and receipts | |
| or dental coverage | | | | |
| Incur any expenses to maintain an office in your home, | | | Form T2200 to be completed by your | |
| automotive or business expenses as required by your | | | employer, mileage log | |
| employer | | | | |
| Buy any tradesperson's or apprentice mechanic's tools | | | Receipts | |
| You, your spouse or dependent children attend | | | Form T2202A/T2202/TL11B/TL11C slip signed | |
| university or college | | | by the student | |
| Support any relatives who were disabled or did you | | | | |
| reside with and provide in-home care for a parent or | | | Details including the income of the person | |
| grandparent who is over 65, or for an infirm dependent | | | receiving the care | |
| adult relative | | | | |
| Adopt a child under 18 during the year | | | Details of adoption fees, expenses | |
| Pay any foreign taxes | | | Details | |
| Purchase your first home | | | Details | |
| Volunteer as a firefighter or as search and rescue | | | Details | |
| volunteer for at least 200 hours in the year | | | | |

| OTHER – DID YOU: | YES | NO | IF YES, PLEASE SEND: |
|--|-----|----|--|
| Pay any federal tax instalments for the year | | | Receipts and current statement of account from CRA |
| Withdraw funds from your RRSP | | | Details |
| Have a spouse or common law partner and dependants | | | Details of their income |
| Change or add direct deposit information | | | Details |
| Change address | | | Details – contact CRA to update |

| NOTES | | |
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