SMITH | SYKES | LEEPER | TUNSTALL LLP
CHARTERED PROFESSIONAL ACCOUNTANTS

Barrie
660 Bayview Drive, Unit 2A
Barrie, ON L4N 9P5
Tel: 705-739-7566
Fax: 705-721-8733

Newmarket
111 Main Street South
Newmarket, ON L3Y 3Y8
Tel: 905-898-4900
Fax: 905-898-3142

ENABLING PEOPLE TO MAKE WISE FINANCIAL DECISIONS.

2018 PERSONAL TAX CHECKLIST

Join us on Twitter and Facebook for tax tips, news and advice, @sslgroupCPAs

Return this completed form with all relevant documentation to our office no later than **April 15th, 2019**, to ensure we can **E-File your return by 5:00 p.m. on April 30th, 2019**. It is imperative that you sign and return your E-File Authorization Form by April 30th, 2019.

Name: ______________________________ Date of birth: ______________
Address: ______________________________ Marital status: ______________
______________________________ SIN: ______________
Home phone: ______________ Cell: ______________ Work phone: ______________
Email: ______________________________ Ext: ______

Please enclose all slips, receipts, and supporting documentation (summarized if possible)

NEW CLIENTS – Please provide us with the last tax return you filed

Attach this checklist to your submission

Did you sell your principal residence? If yes, we need the year of acquisition, sale proceeds and address,	☐Yes ☐No
Provide information to Elections Canada?	☐Yes ☐No
Were you born in the USA, or are you a US citizen / Green Card holder?	☐Yes ☐No
Did you own foreign stocks or property with a cost greater than $100,000 at any time during the year?	☐Yes ☐No
Have you registered for Canada Revenue Agency's online mail program?	☐Yes ☐No

DEPENDANT INFORMATION

Name(s)	Date(s) of Birth	SIN	Income

How would you like your tax return delivered?

PDF (password protected) ☐ - **Summary** ☐

Save Time!

EMAIL your tax information to our client administrator:

In Newmarket: Cynthia Wedge cynthia.wedge@sslgroup.ca

In Barrie: Anne Ffrench anne.ffrench@sslgroup.ca

EMPLOYMENT INCOME AND DEDUCTIONS

- Employment income - *provide T4* ☐
- Commission, other employment income - *provide T4A* ☐
- Employment insurance & other benefits - *provide T4E* ☐
- Employment expenses - *provide signed T2200* ☐
- Annual union / prof. dues - *provide summarized receipts* ☐
- Moving expenses related to employment - *call us!* ☐

Access worksheets for employment expenses on our Forms page at www.sslgroup.ca/forms

- Or -

Employment Expenses Worksheet | **Allowable Vehicle Expense Worksheet** | **Home Office Expense Worksheet**

RETIREMENT INCOME AND DEDUCTIONS

- Pensions and annuities - *provide T4A* ☐
- Old Age Security pension - *provide T4A(OAS)* ☐
- Canada Pension Plan benefits - *provide T4A(P)* ☐
- Registered Retirement Income Fund - *provide T4RIF* ☐
- Foreign pension income ☐
- RRSP withdrawals - *provide T4RSP* ☐
- RRSP contribution slips - *up to March 1st, 2019* ☐
- Split pension income with your spouse ☐

INVESTMENT INCOME AND DEDUCTIONS

- Mutual fund and trust income - *provide T3* ☐
- Interest, dividend and other income - *provide T5* ☐
- Partnership income - *provide T5013* ☐
- Securities transactions statements - *provide T5008* ☐
- Other / foreign income, i.e. U.S. income slips ☐
- Gains and losses from the sale of investments - *provide:* ☐
  - Monthly investment statements
  - Annual trading summary
  - Details of original cost when purchased (price and date)
- Interest expense and investment management fees ☐

If you sold property other than your principal residence, i.e. cottage, rental or other investment property – *contact us for details*

OTHER SOURCES OF INCOME AND DEDUCTIONS

- Rental income and expenses ☐
- Self-employment income and expenses ☐
  (between ages 65 & 70? Elect to stop CPP contributions? ☐ Yes ☐ No*)*
- Child care expenses - *provide invoices or name and SIN of caregiver* ☐
- Received or paid child and/or spousal support – *provide amounts, name and SIN of recipient* ☐

Access worksheets for self-employment & rental income/expense on our Forms page, at www.sslgroup.ca/forms

- Or -

Business Income & Expense Worksheet | **Allowable Vehicle Expense Worksheet** | **Home Office Expense Worksheet** | **Rental Income/Expense**

TAX CREDITS

- Medical expenses, *(have your pharmacy print an annual summary of prescriptions)* ☐
- Health and travel insurance premiums ☐
- Nursing / retirement home annual invoice ☐
- Donations ☐
- Tuition - *provide T2202A (signed if parent is claiming)* ☐
- Student loan interest ☐
- Disability - *provide T2201 certificate* ☐
- Property tax and rent paid - *provide receipts* ☐
- First-time home buyer ☐
- Public transit passes (65 years of age or older) ☐
- Home accessibility reno costs (Seniors / disability) ☐
- Teacher / ECE expenses ☐