Personal Tax Return Checklist

(Canada)

Taxpayer's Name	
Social Insurance Number	
Date of Birth	
Year-End	31 December 2019
	I hereby certify that the information completed below is a true and complete response. I acknowledge that the responsibility for completing true and accurate tax returns is mine alone. I accept Fuel Accounting's Terms and Conditions.

We require a separate form for each taxpayer. Some expenses can be claimed by either spouse – DO NOT DUPLICATE THESE – include in one tax payer only and we will allocate.

To prepare your year-end tax return we need to gather some information from you. It is important that you answer all questions completely as there could be severe tax consequences for incorrect information. More information is better than less. All questions are in relation to the tax year being completed or as at 31 December unless otherwise mentioned. If the answer to any question is "Yes" please supply additional details. These questions all relate to your non-business activity (a different checklist exists for business activity).

THIS IS NOT A COMPREHENSIVE CHECKLIST. PLEASE NOTIFY US OF ANYTHING ELSE THAT MAY EFFECT YOUR TAX RETURN.

DO NOT DELETE ANYTHING FROM THIS CHECKLIST – ANSWER YES OR NO TO EVERY QUESTION.

Prior Year Return

If we don't already have them, we will need a copy of the prior year's T1 return and resulting Assessment Notice.

Access to your Personal CRA Account

It is very helpful for us to have access to your personal (individual T1) CRA account (this is different from your business account). This allows us to verify information more easily. You can do this from your CRA My Account page, Quick links, Authorize a representative. Enter our BN 801528571 (Fuel Accounting Professional Corporation, Peter McCarroll, 647-367-0876). Please authorize online access for ALL available program accounts at Level 2 with no expiry date.

Information Slips & Receipts

Please **scan** all relevant information slips and send with this document. Here are examples of the slips that you may have (this is not exhaustive):

- All information Slips (T4, T3, T5, T4E, T4A, T4AP, T4RSP, T4RIF, T5013)
- Old Age Security and CPP benefits
- Other Pensions and Annuities
- Employment insurance benefits
- Social assistance payments
- Workers compensation Benefits
- RRSP contributions
- Universal Child Care Benefit Confirmation (RC62)
- Disability Tax Credit Certificate (T2201)

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- Declaration of Conditions of Employment (T2200)

For completeness you may choose to list the slips/forms here (if there are not enough lines then include in the general comments area):

Type	Issuer

General Information

#	Question	Response
1	What was your current residential address?	
2	What was your Province or Country of Residence on Dec 31?	
3	What was your marital status at Dec 31? (NOTE: Common-law means living together for at least 12 months; Separated requires 90 days post-separation)	
4	Has your marital situation changed from last year?	
5	What is your spouse's name, SIN, DOB & income for the year?	
6	Did you reside within Nisga'a Lands on 31 Dec?	
7	Are you a Canadian Citizen?	
8	If Yes – do you authorize the CRA to give your details to Elections Canada? (children 14-17 can say Yes if they want to go on the Future Electors list)	
9	Did you hold foreign property (includes non-Canadian shares even if held in Canadian Brokerage accounts (but not in RRSP) and rental properties) at any time in the tax year with a total cost of more than CAD$100,000?	
10	Are you, or any of your dependants, disabled or infirm?	
11	Did you buy or sell (or convert to/from rental) your principal residence during the year?	
12	Are you a member of clergy (religious officer)?	
13	Are you a US Citizen or Permanent Resident?	
14	Did you pay any tax by instalments last year?	
15	Did you immigrate to Canada or emigrate from Canada during the year or were you absent from Canada for more than 6 months?	
16	Did you contribute to or withdraw from a TFSA during the year? Please provide totals.	
17	Do you live in a small and rural community (outside of a census metropolitan area) on December 31, 2019? (AB, SK, MB, ON only)	

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Dependants

Include any new children since last return (or all children, if this is our first return for you; add more in comments)

Full Name	Address (if not yours)	Relationship	DOB	Disabled? Infirm?	Income

Income

You do NOT need to report income in an RRSP, TFSA or RESP (or similar) plans. If you answer YES to any question you will need to provide more details. Please do that now or it will slow your return down!

#	Question	Response
1	Are you a shareholder or partner in any organization that we do not prepare tax information for?	
2	Do you own a rental property (including Airbnb income)? Rental transactions list required.	
3	Did you withdraw funds from an RRSP during the year?	
4	Did you receive any taxable benefits from an employer or business that were not included in a T slip (such as access to a company vehicle, etc.)?	
5	Did you receive any income not reported on an attached information slip or already covered?	
6	Did you sell, gift or otherwise dispose of any investments or real property (even if reported on a T slip; excluding in a registered account)? Supply further details.	
7	Do you own any bonds or GICs that do not produce interest income each year?	
8	Did you receive any spousal or child support payments?	
9	Do you expect next year's income to be significantly different from this year?	

Deductions

Did you incur any of the following expenses not included in slips (scan & send relevant documentation – add totals to the response column)? If you answer YES to any question you will need to provide more details (such as copies of receipts, additional slips, etc). Please do that now or it will slow your return down!

#	Question	Response
1	Expenses against employment income	
2	Child care*	
3	Moving (more than 40km)*	
4	Support for a child, spouse or common-law partner	
5	Tuition/education	
6	Interest paid on student loans	
7	Charitable Donations*	

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8	Home accessibility*	
9	Medical Expenses* (need to be more than 3% of income or $2352 to be useful; don't claim Provincial Health Plan premiums)	
10	Union/Professional Dues	
11	Subscriptions to Canadian Digital News	
12	Employment/commission expenses not reimbursed (doesn't include expenses for your business that we are doing taxes for)	
13	Carry costs for investments	
14	Does anyone over the age of 65 with income under $20,000 live with you (other than your spouse)?	
15	Other eligible deductions	
16	Did you repay any social benefits during the year?	
17	Did you make any RRSP contributions?	
18	Do you have a Home Buyers Plan?	
19	Ontario Residents (Trillium Benefit) Total Rent/Property Tax Paid Name of Landlord/Municipality	
20	Eligible educator school supply (teachers only)	

* Do not include on BOTH spouses checklist – only one.

Other

Please use the space below to document anything else that we might need to know.

SUBMITTING THIS FORM TO US MEANS THAT YOU AGREE WITH OUR TERMS AND CONDITIONS AND CERTIFY THAT YOU HAVE NOT OMITTED ANY RELEVANT INFORMATION AND THAT ALL INCOME HAS BEEN REPORTED. WHILE WE TAKE EVERY EFFORT TO ENSURE THAT YOUR RETURN IS COMPLETE AND ACCURATE WE TAKE NO RESPONSIBILITY FOR THE CONSEQUENCES IF ANY INFORMATION PROVIDED TO US IS IN ANY WAY INCORRECT OR MISSING. IN ALL CASES OUR LIABILITY IS STRICKTLY LIMITED TO THE FEES PAID TO PREPARE THE PERSONAL TAX RETURN. PLEASE NOTE THAT FOR CORPORATE CLIENTS PERSONAL TAX RETURNS ARE NOT INCLUDED IN YOUR FEES. A MINIMUM FEE OF $100+GST/HST IS CHARGED FOR EACH PERSONAL TAX RETURN PREPARED (MORE IF YOU HAVE MORE THAN T-SLIPS) AND WILL BE INVOICED TO THE TAXPAYER DIRECTLY.