Strutt Armstrong
Chartered Professional Accountants

2018 Personal Tax Checklist

Personal Information	**SIN**	**Date of Birth**
Name		
Name of Spouse/Partner		
Name of Dependants		
Address		

Home phone ____________
Cell phone ____________
Office phone ____________
Email address ____________
What is the best way to contact you? ____________

Current marital status: ____________
Did your martial status change during 2018? YES / NO
Date of change ____________
Will we be preparing the returns for both you and your spouse? YES / NO
If no, please provide spouse's income for each year we will be filing for you ____________

Are you a Canadian citizen?	YES	NO
Do you own foreign assets with a value of more than $100,000 (if yes please provide details)	**YES**	**NO**
Do your or anyone in your family receive the disability tax credit?	YES	NO
Did you sell your Principal Residence during the year	YES	NO

If YES: Who was on title ____________
Date Purchased ____________
Selling Price ____________

Details of Income

Slips

Please attach the following:

T4		T4A	
T5		T4RSP	
T3		Total of tips claimed	
Pension slips		T4A (OAS)	
Foreign pensions		T4AP	
Other investment income		T4RIF	
Mortgage interest income		T5003 tax shelters	
		T4E	

Other slips you may have: T4PS, T5007, T5008, T5013, T5018 (subcontractors), amounts for scholarships/bursaries

4 Court Street North, Milton, Ontario L9T 2S1
Phone 905 878 7338 Fax 905 878 8304 Visit us online at **struttarmstrong.ca**

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Investment Account Statements ______
Details of Capital Gains and Losses including Adjusted Cost Base ______
Do you file any foreign tax returns? If yes, please provide YES / NO

Child Support
Amount Received ______ Amount Paid ______

Spousal Support
Amount Received ______ Amount Paid ______

Rental Properties

Address ______
City ______ Province ______ Postal Code ______

Please fill out and attach the following rental income statement for each rental property https://www.canada.ca/en/revenue-agency/services/forms-publications/forms/t776.html

Self employed Individuals

GST/HST registration number ______

GST/HST return included YES / NO GST/HST return to be prepared by us YES / NO

Please fill out and attach the following business income statement for each business https://www.canada.ca/en/revenue-agency/services/forms-publications/forms/t2125.html

IMPORTANT - do NOT include the amount of GST/HST received or paid out on the business income statement
These amounts need to be reported separately on the GST/HST return
Please remember to indicate the following:

Business use of automobile
Kilometres driven for business purposes ______
Total kilometres driven during the year ______

Business use of residence
Square footage of office ______
Total square footage of residence ______

Does your business earn money directly from websites? YES NO
If yes, please provide the website: ______
Please indicate the percentage of revenue earned from your website: ______ %

RRSP receipts ________
Home buyers plan/Lifelong Learning Plan withdrawals ________
Did you buy your first home after January 27, 2009? ________
Professional dues ________
Union dues ________
Child care expenses ________
Moving expenses ________
Tradesperson tools (must have completed T2200 form) ________
Investment fees and/or interest on money borrowed to purchase investments ________
Employment expenses (include T2200 form) ________
Public transit passes ________
Family caregiver tax credit ________
Tuition receipts (T2202/T2202A/TL11A, B, C, or D) ________
Medical expenses (include receipts) ________
Charitable donation receipts ________
Political contributions ________
Ontario rent or property taxes ________
Senior's healthy homes renovation tax credit ________
Interest on student loans ________
Disability tax credit? If so for whom ____________________________ ________

Did you make any income tax instalment payments for 2018? Amount: _____________ YES / NO

Are you a first-time home buyer in 2018? Acquisition date: _______________ YES / NO

Do you have to make Home Buyer's Plan or Lifelong Learning Plan repayments? YES / NO
Did you make any withdrawals from your RRSPs for these plans listed above in 2018? YES / NO
Please provide details for the above

Other Information Required

2017 Notice of Assessment
2017 personal tax return (for new clients only)
Any correspondence received by the CRA during the past year

Do you currently have direct deposit with CRA? YES / NO
If no, please include a void cheque so that we can start direct deposit for you.

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