



Chartered Accountant
Professional Corporation
Unit 1, 2440 Industrial Street, Burlington, ON L7P 1A5
Telephone (289) 427-5285, Fax (866) 571-5170, Mobile (905) 399-5170
Email: info@paulvet.ca Web: paulvet.ca

Personal Tax Return Checklist - 2019

To prepare your accurately, consider using last year's return (esp. Slip Summary Page) and this checklist. Please check those that apply and compile them in the order shown. Use paper clips to group items if you wish. Blue Highlighted ones are the most common ones in many returns.

Your Name: _____

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Y?	Slip/ Form	Description
<input type="checkbox"/>	T4	Employment
<input type="checkbox"/>	T4E	Employment insurance
<input type="checkbox"/>	T4A(OAS)	Old age security
<input type="checkbox"/>	T4A(P)	Canada Pension Plan
<input type="checkbox"/>	T4RIF	RIF income
<input type="checkbox"/>	T4RSP	RRSP / RIF income
<input type="checkbox"/>	T4 E/ RCA/ PS	Any other T4 slips
<input type="checkbox"/>	T5	Investment income
<input type="checkbox"/>	T3	Pension income
<input type="checkbox"/>	T5013/T101	Partnership / resource
<input type="checkbox"/>	T5007	Benefits statement
<input type="checkbox"/>	T5008	Capital Gains / or losses – Sale or Non registered investments (broker may / may not issue T5007)
<input type="checkbox"/>		Foreign income (pension, property, investment income)
<input type="checkbox"/>		Self-employed income & expenses, (please attach or prepare separate summary)
<input type="checkbox"/>		Rental income & expenses (please attach or prepare separate summary)
<input type="checkbox"/>		Support income or expense (from separation/divorce)
<input type="checkbox"/>		Full details of all investments sold during the year (i.e. annual trading summary).
<input type="checkbox"/>		Adjusted Cost Basis data for investments sold during the year
<input type="checkbox"/>		Statement of interest paid for business or investment loans
<input type="checkbox"/>		Investment counsel/ management fees, prior year tax return preparation fees
<input type="checkbox"/>		RRSP contributions
<input type="checkbox"/>		Union & professional dues
<input type="checkbox"/>		Employment expenses & expenses details –employer must <u>sign</u> form T2200
<input type="checkbox"/>		Automobile expenses (for business, rental or employment expenses) – see form T777 for required
<input type="checkbox"/>		Home office expenses (for business, rental or employment expenses) – see form T777 for required
<input type="checkbox"/>		Moving expenses during the year (moved 40 km + closer to work or school)

