



RELIABLE
Accounting & Tax Services

2018 PERSONAL INCOME TAX CHECKLIST

Date: _____

Name _____			
Address _____			
Telephone Number: Home _____		Business _____ Cell _____	
Date of Birth _____		Social Insurance Number _____	
Email _____			
Marital Status: Single <input type="radio"/> Married <input type="radio"/> Common Law <input type="radio"/> Separated <input type="radio"/>			
Divorced <input type="radio"/> Date of change in marital status _____			
Spouse's name _____		Spouse's date of Birth _____	
Spouse's Social Insurance Number _____		Cell _____	

List any children added to your family in 2018 by way of birth, adoption or marriage. **(Note that adoption expenses are now deductible!)**

Name		Relationship	SIN	Date of birth
First name	Last name			yyyy/mm/dd

TYPE OF INCOME	FORM	NUMBER OF SLIPS	\$
Employment Income	T4		.
Pension, Retirement, Annuity, Other Income	T4A		.
Canada Pension Plan	T4A (P)		.
Old Age Security	T4 (OAS)		.
RRSP (cash in)	T4 (RSP)		.
RIF Income	T4 (RIF)		.
Employment Insurance Benefits	T4E		.
Trust and Mutual Fund Income	T3		.
Interest and / or Dividend Income	T5		.
Interest from Other Sources	Provide source and amount		.
Social Assistance, Welfare, & WSIB etc.	T5007		.
Income from Tips, or Casual Labor	-----		.
Universal Child Care benefits			.
Support or Maintenance Support Received			.
Home Buyers Plan RRSP Withdrawals			.
Lifelong Learning Plan RRSP Withdrawals			.
SELF EMPLOYED & OTHER EARNINGS	YES/NO	PROVIDE DETAILS	
Do you have rental income?			
Do you have business or professional income?			
Do you have farming income?			
Do you participate in Employment Insurance Plan for self-employed people?			

Did you sell any stocks, bonds, real estate or other property in 2018?			YES	NO
Description of asset sold	Year Purchased	Original Cost	Improvements made	

TYPE OF EXPENSE OR DECUCTION	FORM	NUMBER OF SLIPS	\$
Employment Expenses – (form must be completed and signed by employer)	T2200		.
Charitable Donations	Official Receipts		.
Medical expenses (including private medical insurance, or group insurance premium)	Official Receipts		.
RRSP deductions	Official Receipts		.
Tuition fees for yourself or your dependants (transfer must be signed by student)	T2202A		.
Interest on Student Loans	Official Receipts		.
Interest paid to earn investment income	Letter from bank		.
Safety Deposit Box	Official Receipts		.
Union dues, Professional dues	Official Receipts		.
Child Care Expenses / Camp fee for children	Official Receipts		.
Alimony or support payments paid out	Official Receipts		.
Transit Pass Credit	Official Receipts		.
Children Arts Tax Credit (under 16 yrs old)	Official Receipts		.
Child Fitness Tax Credit (under 16 yrs old)	Official Receipts		.
Ontario Children’s Activity Tax Credit (under 16, or if disabled under 18 yrs old)	Official Receipts		.

MISCELLANEOUS CREDITS	FORM	\$
College or University Student Residence fees (maximum claim is \$25.00 per year)	Indicate yes if you qualify	.
Rent paid for principal residence (provide landlord’s information)	Rent Receipts	.
Property Tax paid on principal residence	Property tax receipt	.
First time Home Buyer in 2018?	Statement of adjustments and legal closing letter	.
Personal income tax installments paid	Installment forms	.

DO YOU HAVE ANY FOREIGN PROPERTY? YES _____ NO _____
 (If yes please provide details) _____

IS THIS INFORMATION COMPLETE? YES _____ NO _____
 (If no, what information is still to come?) _____

Direct Deposit Information: Bank _____ Branch _____ Account # _____

I acknowledge that I have disclosed all of my 2018 income to Reliable Accounting & Tax Services. I further acknowledge, under the Personal Information Protection and Electronic Documents Act (PIPEDA), the above information may be used by Reliable Accounting & Tax Services for the preparation of my current, future and prior years income tax returns, and any related documents which may be based upon my Income tax Return.

Signature _____ Date _____