

Personal Tax Checklist

Primary Contact Information

Spouse Information (if applicable)

Name: _____
 SIN: _____
 Date of Birth: _____
 Primary Phone: _____
 Secondary Phone: _____
 Email: _____

Name: _____
 SIN: _____
 Date of Birth: _____
 Primary Phone: _____
 Secondary Phone: _____
 Email: _____

Current mailing address: Province of residence as of December 31 st :	Previous mailing address & date of move: <i>(If moved during the year)</i>
---	---

Marital Status: Married Common-law
 Single Widowed
 Divorced Separated

Did either of the following change during the year?

Marital Status: _____
(If yes, provide date of change)

Last Name: _____
(If yes, provide new last name)

Dependents

Name	Male	Female	Social Insurance No.	Date of Birth		
				Year	Month	Day

	Primary		Spouse	
Are you a Canadian citizen?	Yes	No	Yes	No
Do you agree to CRA providing your name, address, and date of birth to Elections Canada for the National Register of Electors?	Yes	No	Yes	No
Did you own foreign property with a cost of \$100,000 or more at any time during the year? (includes U.S. property and investment portfolios with stocks or mutual funds with U.S. or International holdings)	Yes	No	Yes	No
Did you sell property (principal residence, rental property, vacation home etc.) during the year?	Yes	No	Yes	No
Do you have, or share, custody of a child after a relationship breakdown? Does this child live with you? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, how often? <input type="checkbox"/> Full-time <input type="checkbox"/> Part-time	Yes	No	Yes	No
Has your banking information changed since your last direct deposit from CRA? If yes, you must provide a VOID cheque.	Yes	No	Yes	No
Did you pay personal tax installments during the year? If yes, \$ _____	Yes	No	Yes	No
Did you withdraw RRSP's to buy a home or to finance full-time education for you or your spouse?	Yes	No	Yes	No
Internet Business Activity: Do you have a webpage or websites from which you earn income?	Yes	No	Yes	No

Northern Residents Deduction

Residents of certain regions of Northern Canada can claim Northern Residents Deduction, which reduces taxes. To qualify, you must live in the prescribed zones continuously for at least six months (must live there on a permanent basis). If your employer includes Box 32 (Northern Travel) on your T4, you are eligible to claim up to two trips out of the Northern zone per year.

1. Did you reside in a prescribed Northern zone for a continuous period of **at least** six consecutive months? Yes No
If not the full year, please provide dates: _____ to _____
2. Is anyone else in your household going to be claiming this deduction? Yes No
3. Does your T4 include Box 32 (Northern Travel)? Yes No
If yes, please provide us with destination, dates and names of all family members travelling.

Check the boxes below that are applicable to your tax return and include any additional details.

Income	Deductions, Tax Credits and Expenses
T4 - Employment Income	RRSP contribution receipts
T4A - Other Income	Professional dues
T4AP - CPP Benefits	Child care expense
T4A OAS - Old Age Security	Employment expenses – T2200 required
T4E - Employment Insurance Benefits	Moving expenses
T4RSP - RRSP Income	Spousal and/or Child Support paid
T4 RIF - RRIF Income	Adoption related expenses
T5 - Interest and Dividend Income	Charitable and/or Political donations
T3 - Estate/Trust / Mutual Funds Income	Tradesperson's tools acquired by an employee
T5007 - Social Assistance / WCB	Tools acquired by apprentice vehicle mechanics
T5013 - Limited Partnership Income	T2201 Disability tax credit
T5008 - Statement of Security Transactions - Provide the cost when purchased	T2202 Tuition and Education
Capital Gains / Losses - Provide an investment statement from your Advisor	T2202 Tuition transferred from dependent
Bitcoin or other cryptocurrency transactions	Interest paid on Student Loans
Interest on personal tax refund	Caregiver amount
Rental Income & related expenses	Eligible educator school supply tax credit Teachers/Early Childhood Educator school supplies
Self-Employment income & related expenses	Investment counsel and management fees
Internet Activities - include website, if applicable	Interest on money borrowed to purchase investments
Income from sources of the sharing economy such as Skip the Dishes, Airbnb, VRBO, Uber, TappCar or other online rental activity	Are you a first time home buyer?
Scholarship, fellowship, bursary	Pension Split: spouses may jointly elect to split certain pension income reported by the other spouse
Alimony / Spousal Support received	Medical expense including premiums paid to a private health services plan i.e. Alberta Blue Cross
Foreign sources	Home accessibility tax credit Home renovations for disabled person or senior citizen
Other Income / Missing tax slips:	Other Deductions, Tax Credits or Expenses:

IMPORTANT: If you do not report all of your income slips (T4, T4A, T5, T3, etc.) and other income when filing your personal income tax return, significant penalties and interest may be assessed by CRA. If you believe that you have not received all of your 2019 slips please provide details of any missing information.

Visit www.ddclp.ca for additional tax information and forms