

**Personal Tax Checklist**

**Tax Year:** \_\_\_\_\_

*Complete this T1 checklist and attach all applicable slips, receipts, and other supplemental information required.*

**Client Portal**

Do you have a client portal?  Yes  No

If yes, you can upload this checklist and the attached information to your client portal:  
<https://wilkinsonrogers.cchifirm.ca/clientportal/account/logon>.

If you have not been set up with a client portal but would like one, please email [office@wilkinsonrogers.com](mailto:office@wilkinsonrogers.com).

If you prefer paper documentation and don't wish to be set up on a client portal, please indicate so by checking the box below.

I prefer paper documentation

You can drop off this checklist with your paper documentation to the office, 214-700 Richmond Street, London ON.

**1. Personal Information**

Your Name: \_\_\_\_\_

SIN: \_\_\_\_\_

Address: \_\_\_\_\_  
 \_\_\_\_\_

Date of Birth: \_\_\_\_\_

**Phone Numbers:**

Mobile: \_\_\_\_\_

Home: \_\_\_\_\_

Work: \_\_\_\_\_ Ext. \_\_\_\_\_

**Email Address:**

Preferred Method of Communication:  Email  Phone: \_\_\_\_\_

Citizenship:  Canadian  Other: \_\_\_\_\_

**Marital Status:**

Single  Married  Common-law  Separated  Divorced  Widowed

If marital status changed during the year, provide date of change:

Spouse's Name: \_\_\_\_\_

Spouse's SIN: \_\_\_\_\_

Spouse's Date of Birth: \_\_\_\_\_

**Spouse's Phone Numbers:**

Mobile: \_\_\_\_\_

Home: \_\_\_\_\_

Work: \_\_\_\_\_

Ext. \_\_\_\_\_

**2. Residence**

Province/Territory of residence on December 31: \_\_\_\_\_

Did you immigrate to Canada or emigrate Canada during the year?  Yes  No

If yes, provide the date into Canada: \_\_\_\_\_

Or the departure date: \_\_\_\_\_

### 3. Foreign Reporting

Did you own or hold foreign property (including real estate) with a total cost between \$100,000 and \$250,000 CAD at any time during the year?  Yes  No

Did you own or hold foreign property (including real estate) with a total cost of more than \$250,000 CAD at any time during the year?  Yes  No

### 4. Dependents

Name	Relationship	Date of Birth	SIN	Physically or Mentally Infirm	Income	Child Care Expenses

If separated, are you claiming an eligible dependent?  Yes  No

### 5. General Income/Deductions

T-slips (T4, T4A, T4E, T5007)  Yes  No

Employment income or taxable benefits not shown on T4 slip: \_\_\_\_\_

If applicable, provide the amount paid for union and professional dues as well as the names of the organizations.

\_\_\_\_\_

List of childcare expenses, with receipts, for each child?  Yes  No

List of spousal support payments made or received?  Yes  No

List of deductible employment expenses?  Yes  No

Is a signed Form T2200 (required for employment expenses) attached?  Yes  No

RRSP contribution receipt?  Yes  No

### 6. Pension Income

T-slips (T4A, T4RIF, T4(OAS), etc.)  Yes  No

### 7. Investment Income/Deductions

T3 – Income from Trust allocations?  Yes  No

T5 – Investment income?  Yes  No

T4PS – Income from profit sharing plans?  Yes  No

T5013 – Partnership income?  Yes  No

T5008 – Income from securities transactions/ Realized gain/loss report?  Yes  No

Did you dispose of property or investments during the year (excluding residence designated as a principal residence) at any time in the year?  Yes  No

If yes, provide details (i.e. broker tax reporting package).

Interest paid to earn investment income? Yes No  
 If yes, enter amount: \_\_\_\_\_

Management fees paid? Yes No  
 If yes, provide statement.

Did you dispose of your principal residence during the year? Yes No  
 If yes, Proceeds: \_\_\_\_\_ Date acquired: \_\_\_\_\_

Did you dispose of any real property other than principal residence during the year? Yes No  
 If yes, provide the legal package and the following:  
 Proceeds: \_\_\_\_\_ Adjusted Cost Base: \_\_\_\_\_

### 8. Self-Employment/Business Income

Financial statement(s)/schedule of revenue and expenses attached? Yes No

If you used a vehicle for business, are the vehicle expenses and both total and business mileage attached? Yes No

If you used a portion of your home for business, are the homes expenses and both total and business square footage attached? Yes No

Is a list of all asset additions and disposals (including cars, equipment, etc.) attached? Yes No

### 9. Rental Income

Did you own rental property? Yes No  
 If yes, attach statement of rental income and answer the next question.

Did you also live in the rental property (in which case no CAA should be claimed)? Yes No

### 10. Other Credits

T2202A – Tuition amount paid for you? Yes No

T2202A – Tuition amount claimed on transfer from dependent (second page signed)? Yes No

Receipt or amount for your student loan interest? Yes No

Receipts/listing of all medical expenses paid in the year for you, your spouse, and dependents? Yes No

Receipts for charitable donations or donations made by way of gifting an item in kind? Yes No

Receipts for political contributions? Yes No

List of eligible teaching supplies purchased (for teachers and early childhood educators only)? Yes No

Public transit passes for travel in 2019 for Ontario seniors (receipts/details)? Yes No

Did you purchase your first home this year? Yes No

Did you pay property taxes/rent in the year? Yes No  
 If yes, provide the following:  
 Amount paid: \_\_\_\_\_ Landlord/Municipality: \_\_\_\_\_