

**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: Ontario

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
				<input type="checkbox"/>		
				<input type="checkbox"/>		
				<input type="checkbox"/>		
				<input type="checkbox"/>		

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: \_\_\_\_\_