

# 2019 Tax Information Checklist

## Contact information (note any updates)

## Family information

- Has your marital status changed?  Yes  No
- Are there any changes to your dependants?  Yes  No
- (provide SIN, name and birth date)

## Questions required for electronic filing

- Are you a Canadian Citizen?  Yes  No
- Do you agree to Canada Revenue Agency providing your name, address, and date of birth to Elections Canada for the National Register of Electors?  Yes  No

## Principal residence reporting

Complete address of the home sold (including postal code): \_\_\_\_\_ Year purchased \_\_\_\_\_  
Sale price \_\_\_\_\_

## Supporting documents

- Notice(s) of (re)assessment for 2018

## Slips used to prepare last year's return

### Other Information

- Date of Birth: yourself and all your dependants

## Other/new income sources

- First year for CPP, OAS?
- T4E for employment insurance payments
- Alimony and/or maintenance received
- Rental property revenue and expenses
- Business, self-employed income and expenses

## Receipts

- RRSP contributions and withdrawal
- Union or professional dues
- Donations
- Medical expenses, including plan premiums
- Child care
- Student loan interest
- T2202 tuition fees
- Moving expenses
- Transit pass
- T2200 Employment expenses
- Investment expenses (interest, mgmt. fees)
- Alimony and/or maintenance paid

## Tax on split income requirement

Did you receive any of the following types of income from a private business, activity or profession where a related

person who is resident in Canada has a significant interest or is actively involved:

1. Dividends or shareholder benefits from a private corporation  Yes  No
2. Partnership or Trust income from a related business  Yes  No
3. Rental income (including through a trust or partnership) where a related person is involved  Yes  No
4. Interest on loans to a private corporation, partnership or trust  Yes  No
5. Income or gains from the disposition of private shares or other property  Yes  No

Please return supporting documents and completed form to: D. Castro Bookkeeping Services, 605 - 111 Catherine St, Ottawa, ON K2P 0P4 or [dayani@dcastrobooks.ca](mailto:dayani@dcastrobooks.ca)

## 2019 T1 Foreign Property Reporting

Canadian resident individuals who held certain property outside Canada with a total cost of more than \$100,000 CAD at any time during the tax year are subject to certain disclosure requirement to the Canada Revenue Agency (CRA).

Non-compliance with this reporting requirement results in severe penalties. To help us determine whether you are subject to the reporting rule, please read and consider each of the following questions carefully when answering them.

If you owned any of the following property at any time during 2019, answer YES to the relevant questions. You may be subject to the foreign property reporting rule, and we may prepare additional forms to submit to the CRA.

1. Funds or intangible property (patents, copyrights, etc.) situated, deposited or held outside Canada  Yes  No
2. Tangible property situated outside of Canada  Yes  No
3. A share of the capital stock of a non-resident corporation held by the taxpayer or by an agent on behalf of the taxpayer  Yes  No
4. An interest in a non-resident trust that was acquired for consideration, other than an interest in a non-resident trust that is a foreign affiliate for the purposes of section 233.4  Yes  No
5. An interest in a partnership that holds a Specified Foreign Property unless the partnership is required to file a T1135  Yes  No
6. An interest in, or right with respect to, an entity that is a non-resident  Yes  No
7. A property that is convertible into, exchangeable for, or confers a right to acquire a property that is Specified Foreign Property  Yes  No
8. A debt owed by a non-resident, including government and corporate bonds, debentures, mortgages, and notes receivable  Yes  No
9. An interest in a foreign insurance policy  Yes  No
10. Precious metals, gold certificates, and futures contracts held outside Canada  Yes  No

Signature: \_\_\_\_\_

Date: \_\_\_\_\_  
Signing date