

2018 PERSONAL TAX CHECKLIST

Personal information				
First name		Last name		
Street address		City		Prov
Postal code	Birthdate	SIN #		
Home phone:	Cell:	Work phone:		
Email 1:		Email 2:		
Marital status <input type="checkbox"/> Single <input type="checkbox"/> Common Law <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed				
Family changes/dates (birth, marital status, death) – please provide details in notes section below				
Canadian citizen <input type="checkbox"/> Y <input type="checkbox"/> N		American citizen <input type="checkbox"/> Y <input type="checkbox"/> N		
Completing return for spouse/partner? <input type="checkbox"/> Y <input type="checkbox"/> N		If no, please provide Net Income: \$ AMOUNT		
Spouse/partner first name		Last name		
Birthdate:		SIN #		
Dependents (children or senior parent living with you) (use notes section if more space needed)				
Name	Address (if different)	Relationship	Birthdate	SIN #
Do you want to provide your address and information to Elections Canada?				<input type="checkbox"/> Y <input type="checkbox"/> N
Do you own investments or property outside of Canada which cost more than \$100,000 CDN?				<input type="checkbox"/> Y <input type="checkbox"/> N
Were you a first time homebuyer in 2018?				<input type="checkbox"/> Y <input type="checkbox"/> N
Did you sell a principal residence in 2018?				<input type="checkbox"/> Y <input type="checkbox"/> N
For self-employed individuals / sole proprietors				
Would you like us to summarize your expenses?		<input type="checkbox"/> Yes, please summarize (extra cost at \$85/hour)		
		<input type="checkbox"/> No, I've already summarized		
Is your business or rental property registered for HST/GST? <input type="checkbox"/> Y <input type="checkbox"/> N		Filing period: <input type="checkbox"/> Regular <input type="checkbox"/> Quick		
Would you like us to complete your HST/GST return?		<input type="checkbox"/> Yes (please include required documents)		
		<input type="checkbox"/> No (please provide copy of HST/GST filed)		
Additional Notes				
Secure delivery of my completed taxes				
In our continued efforts to be a "green" company by becoming a paperless office, we will be providing a digital copy of your completed Personal Tax Return through our secure delivery portal. <i>*A paper copy can be provided upon request.</i>				
I will pick up my source documents/records from:		<input type="checkbox"/> North Vancouver	or	<input type="checkbox"/> New Westminster
I would like you to return my documents by:		<input type="checkbox"/> Courier	or	<input type="checkbox"/> Registered Mail

Please come pick up your documents when notified or there will be a \$15 surcharge for returning your documents by courier/mail.



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*denotes professional corporation

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PLEASE CHECK THE ITEMS THAT APPLY TO YOU

Personal Income	Investment Income
<input type="checkbox"/> T4, T4A – Salaries and employment	<input type="checkbox"/> T3, T5, T4S – Interest and Dividends
<input type="checkbox"/> Other employment benefits	<input type="checkbox"/> T5008 – Statement of Security Transactions
<input type="checkbox"/> T4A (P) – Canada Pension Plan benefits	<input type="checkbox"/> Interest on Tax Refunds
<input type="checkbox"/> T4A (OAS) – Old Age Security benefits	<input type="checkbox"/> T600 – Canada Savings Bonds
<input type="checkbox"/> T4A – Other pension or superannuation	<input type="checkbox"/> T3 – Mutual Fund Income
<input type="checkbox"/> T4RSP – RRSP income	<input type="checkbox"/> Foreign income
<input type="checkbox"/> T4RIF – RRIF income	<input type="checkbox"/> Annuities
<input type="checkbox"/> T4E – Employment Insurance benefits	<input type="checkbox"/> Rental income (full details required)
<input type="checkbox"/> T5007 – WCB benefits/social services benefits	<input type="checkbox"/> Summary of investment contract holdings
<input type="checkbox"/> T1137 – Home Buyers Plan	<input type="checkbox"/> T5013 – Limited partnership income (loss)
<input type="checkbox"/> T4RCA – retirement income	<input type="checkbox"/> Capital gain/losses (full details required)
Other Income	Business Earnings
<input type="checkbox"/> Alimony received	<input type="checkbox"/> Self-employment earnings (details required)
<input type="checkbox"/> Child support received	<input type="checkbox"/> Farming/fishing earnings (details)
<input type="checkbox"/> Scholarships/bursaries	<input type="checkbox"/> Professional earnings (details)
<input type="checkbox"/> Other – specify: OTHER INCOME SOURCE	<input type="checkbox"/> Self-employment commissioned earnings (details)
Refundable & Non-refundable Credits	Other Deductions
<input type="checkbox"/> Married amount – spouse's net income \$ AMOUNT	<input type="checkbox"/> RRSP
<input type="checkbox"/> Equivalent to married amount (full details required)	<input type="checkbox"/> Union/professional dues
<input type="checkbox"/> Disability deductions	<input type="checkbox"/> Alimony paid
<input type="checkbox"/> T2202 – tuition fees	<input type="checkbox"/> Child support paid
<input type="checkbox"/> Dependent Tuition Credit or Net Income \$ AMOUNT	<input type="checkbox"/> Interest paid on student loans
<input type="checkbox"/> Medical receipts	<input type="checkbox"/> Interest and carrying charges on investments
<input type="checkbox"/> Charitable donations	<input type="checkbox"/> Investment counsel and accounting fees
<input type="checkbox"/> Attendant care expenses	<input type="checkbox"/> Employment expenses (details required, form T2200)
<input type="checkbox"/> Limited partnership losses of other years	<input type="checkbox"/> Deductible legal fees
<input type="checkbox"/> Education Coaching Amount (BC)	<input type="checkbox"/> Child care expenses
<input type="checkbox"/> Eligible Educator School Supply Tax Credit	<input type="checkbox"/> Moving expenses (details required)
<input type="checkbox"/> Volunteer Firefighter Credit	<input type="checkbox"/> TL2 – Claim for boarding and lodging
<input type="checkbox"/> Search and Rescue Credit	
	Other items
Additional documents	<input type="checkbox"/> Political contribution receipts
<input type="checkbox"/> Restricted farming losses carry forward	<input type="checkbox"/> Allowable business investment loss
<input type="checkbox"/> Prior year Notice of Assessment	<input type="checkbox"/> Employment insurance benefit repayments
<input type="checkbox"/> Installment payments for current year	<input type="checkbox"/> Dependent data (GST credit and child tax benefit)
<input type="checkbox"/> Details of foreign property or investments held	<input type="checkbox"/> Declaration of conditions of employment
<input type="checkbox"/> Capital and non-capital losses carry forward	<input type="checkbox"/> Loss carry forward information
	<input type="checkbox"/> First time homebuyer in 2018
	<input type="checkbox"/> Sale of principal residence in 2018

**IF THIS IS YOUR FIRST YEAR FILING WITH US,
PLEASE PROVIDE A COPY OF YOUR PREVIOUS YEAR'S TAX RETURN.**

Need more info? Call or email us, or visit our website at <https://lorennancke.com/>