

All Taxpayers Checklist 2018 Tax Year

The following checklist is a reference to help you in gathering items needed to prepare your 2018 personal income tax return.

- A copy of your last year's Notice of Assessment
- Tax Instalment Notice from the Canada Revenue Agency confirming total paid for the 2017 tax year
- 2017 Property Tax Statement and receipts and/or rental receipts for your personal dwelling
- T4 and T4E slips for any employment income, commission income, employment insurance or other benefits
- T4A slips for Old Age Security, Canada Pension Plan, patronage allocations and other pensions
- T3, T5, T5008 and T5013 slips for any dividends, interest or other investment income received
- Year end investment packages (this will provide us with gains/losses and management fee reporting)
- Other pertinent income slips – T5007 (social assistance or WCB)
- Medical expenses - Refer to our website for a medical expense form to complete and return with your receipts
- Official charitable donation and child care receipts
- Official receipts for union dues, professional dues, T2202A (tuition) slip, student loan interest and RRSPs
- Consumable supplies invoices (for Teachers and Early Childhood Educators)
- Details on changes in dependants and earnings of dependants
- Changes in mailing address, contact information (telephone and email), name changes, marital status changes and if a baby has been born in 2018 (include name and date of birth)

Important Notes:

1. Registered Retirement Savings Plan contributions must be made by March 1, 2019 to be eligible for a deduction on your 2018 personal tax return. If you need tax planning advice regarding RRSPs, please have your books to us by February 15 and clearly indicate that you require RRSP advice.
2. Do not separate any income slips – all slips will be returned to you.
3. Referring to your prior year income tax return can assist you with knowing what was claimed previously and what slips/documents to bring in this year.