

2018 Personal Tax Return Checklist

Name _____
Social Insurance # _____
Phone Number (h) _____ (c) _____
Address (if changed) _____
Date of Birth: _____
Email: _____

For Office Use Only:

Date Received: _____
Prep: _____
Rev: _____
Other: _____

Ref/Owe: _____

Family information:

Marital Status: Single Common Law Married Separated Divorced Widowed

Did your marital status change in 2018? Yes No If so, what was the date: _____

Spouse/Partner Name _____ SIN: _____ DOB: _____

Are we filing a return for your spouse? Yes No Check if your spouse had no income for 2018

Do you have an eligible equivalent to spouse? Yes No

Name and birth date of child born in 2018 _____

Dependant name(s) and SIN(s) if applicable (< 19 yrs old): _____

Are all persons described above Canadian citizens? Yes No If no, please specify _____

Do all filing persons wish to register with Elections Canada for 2018? Yes No

Did you have foreign property in excess of \$100,000 in 2018? Yes No

Do you drive a company vehicle? Yes No

Do you own any companies? Yes No If yes, please provide the names _____

2018 Income – Please provide the following:

Employment income - please include:

T4 slips for all sources of employment

List of expenses associated with employment. Note: Your employer needs to complete a T2200 for you to be eligible.

Self-employed fisher / sole proprietor income - please include:

List of all income List of all business expenses Annual dues or professional memberships

Use of vehicle for 2018: # of personal kms _____ # of business kms _____ Type of vehicle _____

Fishing settlements bait, fuel expenses and administrative fees, etc.

Investment income

Income slips (T5s and T3s) for all investments and interest bearing bank accounts (Note: T3 slips may not be received until end of March)

T3 slips for any monies received from a Family Trust

Did you sell shares in 2018? If so, please enclose a gain/loss report

Management fees paid on investment portfolios \$ _____

Do you hold investment loans? If so, what interest did you pay for 2018? _____

Did you sell any property in 2018? (i.e. Cottage, land, principal residence, etc.)

Other income

- Canada Pension Plan - T4A (P) Old Age Security - T4A (OAS) Registered Retirement Plans - T4RIF
- RRSP withdrawals - T4RSP Unemployment payments - T4E Commission income – T4A
- Scholarships or bursaries – T4A Workers’ Compensation – T5007 Social Assistance – T5007
- Spousal support \$ _____ Universal Child Care payment- RC 62
- Rental income - Please enclose report of income and expenses and details of property sales and purchases
- Do you wish to split pension income with a spouse? Yes No

Credits

- Medical expenses including prescriptions, prescribed medical supplies, dental, VON care, blood collection fees (**Your pharmacy can print you out a complete list of prescriptions for 2018**, which is preferable to the individual receipts. If you do not obtain an annual receipt, please add slips and list totals for each taxpayer. Please note: Massage therapy is not eligible as a medical expense in the province of Nova Scotia.
- Health insurance or Nova Scotia Pharmacare fees
- Did you travel for medical purposes in 2018? If so, please indicate dates, # of kms travelled and whether you were medically required to have a driver. You also require a letter of proof for the appointments.
- Are you or any member of your family disabled? Who: _____
- Are you a caregiver? If so, please indicate name and SIN of the individual and their net income for 2018:

- Tuition slips – if slips are for children, will they be transferring the credit to their parent’s return? Yes No
(Please submit tuition slips already signed by the student on the back). Please note: the 2018 budget has extended eligible tuition credits to include occupational skills courses taken at post-secondary institutions.
- Student loan interest
- Are you a teacher? If so, you need a signed statement from the employer that verifies purchase of eligible teaching supply receipts up to \$1,000 to claim the \$150 tax credit.
- Did you renovate components of your house for accessibility purposes? If so, you could be eligible for up to a \$10,000 tax credit. (Note: You have to be eligible for the disability credit OR 65 and older to claim this credit – please enclose details and supporting invoices)
- RRSP contributions Total of 2018 \$ _____ Home Buyer’s Plan? Yes No
- Child care expenses – please enclose receipts with business number or social insurance number and name of provider
- Donations
- First-time home buyer in 2018?
- Public transit passes? Please include receipts.
- Volunteer firefighter / search & rescue? Do you have at least 200 hours of volunteer service in 2017? Yes No
*You must have an official letter from the chief or delegate with full contact information and signature.
- Moving expenses: Date of move _____ Reason _____
- Tax Installments paid \$ _____

Other Notes to Preparers:
