

# Towler and Associates, CPAs

#202-267 West Esplanade Ave, North Vancouver, BC, V7M 1A5

## 2019 Personal Income Tax Checklist

Name: \_\_\_\_\_ Email: \_\_\_\_\_  
Address: \_\_\_\_\_ Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

**Please Note: We need to receive your information by March 30th to ensure that we can complete your return by April 30th.**

To assist our staff in preparing your personal tax return, please group your tax information as below.

Please inform us if any of your info has changed from the prior year, e.g.: changes to address, dependants, marital status etc.

Did you sell any real estate during the year, including your home?

- If you did, we will need to know the dates of acquisition and sale, proceeds & description of property? Use "notes" spaces below

Has your son/daughter started college; are you taking care of an elderly parent?

If you are filing separately from your spouse/common-law spouse, what is her/his approximate net income, name and SIN

### Tax information required to complete your tax return. Which situation applies to you?

\* **General tax information for most taxpayers - Complete sections A & B**

\* **If you are eligible to claim employment expenses (your employer has issued a T2200) - Also complete Sections D & G**

\* **If you have made RRSP contributions or withdrawals - Also complete Section C**

\* **If you have self-employed income and expenses - Also complete sections E, F, G & H**

\* **If you have to file a GST return (Bring your GST 34-2 form if you have received one) - Also complete section J**

\* **If you have rental and expenses to report - Also complete sections G & I**

### Section A

#### TAX SLIPS & INFORMATION

Y/N #slips \_\_\_\_\_ T4's - from employer  
Y/N #slips \_\_\_\_\_ T5's - from bank or broker  
Y/N #slips \_\_\_\_\_ T3's - from trusts  
Y/N #slips \_\_\_\_\_ T4E's - for EI benefits  
Y/N #slips \_\_\_\_\_ T4A's - pension & annuity income  
Y/N #slips \_\_\_\_\_ T4 - OAS - Old Age Security  
Y/N #slips \_\_\_\_\_ T4A (P) - Canada Pension Plan  
Y/N #slips \_\_\_\_\_ Additional T slips -T600, T5007, etc.  
Y/N #slips \_\_\_\_\_ Pension adjustment (PA) slips  
Y/N #slips \_\_\_\_\_ Foreign Pension info & receipts  
Y/N #slips \_\_\_\_\_ T5013 Partnership  
Y/N #slips \_\_\_\_\_ Stmt. of Gain & Loss on investment accounts  
Y/N \_\_\_\_\_ Any income producing foreign property held

**\*\*2019 Tax Instalments Paid** \_\_\_\_\_

### Section B

#### OTHER INCOME & EXPENSES

\$ \_\_\_\_\_ Alimony or separation payments or income  
\$ \_\_\_\_\_ Child care costs (Provide details)  
\$ \_\_\_\_\_ Child Support  
\$ \_\_\_\_\_ Donations (receipts required) (1st time donor?)  
\$ \_\_\_\_\_ Medical/Dental (receipts and/or doctor prescript)  
\$ \_\_\_\_\_ Tuition fees (over \$100 each) (T2202/TL11)  
\$ \_\_\_\_\_ Interest paid on investment loans  
\$ \_\_\_\_\_ Moving expenses (details required)  
\$ \_\_\_\_\_ Qualifying CND Digital Subscription (max \$500)

NOTES: \_\_\_\_\_

### Section C

#### RRSP

\$ \_\_\_\_\_ RRSP - Contribution slips  
\$ \_\_\_\_\_ T4RSP - Withdrawal slips  
\$ \_\_\_\_\_ T4RIF - Receipt slips  
\$ \_\_\_\_\_ Home Buyer or LLLP repayment

### Section D

#### EMPLOYMENT EXPENSES - T777

**\*\*Please remember to bring your completed & signed T2200 form filled out by your employer\*\***

\$ \_\_\_\_\_ Accounting & legal  
\$ \_\_\_\_\_ Advertising & promotion  
\$ \_\_\_\_\_ Auto expense (**see AUTO EXP.**)  
\$ \_\_\_\_\_ Meals & entertainment  
\$ \_\_\_\_\_ Office expenses  
\$ \_\_\_\_\_ Professional or union dues  
\$ \_\_\_\_\_ Travel  
\$ \_\_\_\_\_ Telephone, cable, internet, hydro  
**Employment - Eligible Home Office Expenses:**  
*Business portion based on office feet<sup>2</sup>/total house feet<sup>2</sup>*  
Sq. feet business area: \_\_\_\_\_ Sq. feet total \_\_\_\_\_  
\$ \_\_\_\_\_ Repairs & maintenance  
\$ \_\_\_\_\_ Utilities - hydro, gas and water  
\$ \_\_\_\_\_ Rent  
\$ \_\_\_\_\_ Insurance (commission paid employees only)  
\$ \_\_\_\_\_ Property Tax (commission paid employees only)

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## Section E

### BUSINESS INCOME - T2125

\$ \_\_\_\_\_ Revenue  
\$ \_\_\_\_\_ Cost of Goods Sold  
\$ \_\_\_\_\_ Wages or sub-contract  
\$ \_\_\_\_\_ Other cost of goods  
\$ \_\_\_\_\_ Purchases

## Section F

### BUSINESS EXPENSES - T2125

\$ \_\_\_\_\_ Advertising & promotion  
\$ \_\_\_\_\_ Auto expense (see AUTO EXP.)  
\$ \_\_\_\_\_ New equipment - provide invoices  
\$ \_\_\_\_\_ Convention fees  
\$ \_\_\_\_\_ Delivery, freight & express  
\$ \_\_\_\_\_ Insurance  
\$ \_\_\_\_\_ Legal, accounting  
\$ \_\_\_\_\_ Licenses, dues & subscripits  
\$ \_\_\_\_\_ Loan interest expense and or bank charges  
\$ \_\_\_\_\_ Maintenance & repair  
\$ \_\_\_\_\_ Meals & entertainment  
\$ \_\_\_\_\_ Office expenses  
\$ \_\_\_\_\_ Office Rent  
\$ \_\_\_\_\_ Office heat & hydro  
\$ \_\_\_\_\_ Office property taxes  
\$ \_\_\_\_\_ Office cable charges  
\$ \_\_\_\_\_ Salaries & wages  
\$ \_\_\_\_\_ Travel  
\$ \_\_\_\_\_ Telephone, internet

## Section J

### GST RETURNS - GST 34-2

\_\_\_\_\_ Do you file your own or prefer us to prepare it?  
\_\_\_\_\_ Do you file annually, quarterly or monthly?  
\_\_\_\_\_ Does income/expense info include GST?

NOTES: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Section G

### AUTO EXPENSES

Make \_\_\_\_\_ Model \_\_\_\_\_ Year \_\_\_\_\_  
Km Business Use: \_\_\_\_\_ Km Total: \_\_\_\_\_  
\$ \_\_\_\_\_ Car allowance received  
\$ \_\_\_\_\_ Fuel (gas & oil)  
\$ \_\_\_\_\_ Insurance (ICBC) + \_\_\_\_\_  
\$ \_\_\_\_\_ Loan interest  
\$ \_\_\_\_\_ Lease payments  
\$ \_\_\_\_\_ Maintenance & repairs  
\$ \_\_\_\_\_ Parking  
Lease terms: From: \_\_\_\_\_ To: \_\_\_\_\_ (Date)  
\$ \_\_\_\_\_ New car - Cost  
\$ \_\_\_\_\_ Old car - Sold for

## Section H

### SELF-EMPLOYED - BUSINESS USE OF HOME

*Business portion based on office feet<sup>2</sup>/total house feet<sup>2</sup>*

Sq. feet business area: \_\_\_\_\_ Sq. feet total \_\_\_\_\_  
\$ \_\_\_\_\_ Utilities - hydro, gas and water  
\$ \_\_\_\_\_ Insurance  
\$ \_\_\_\_\_ Mortgage interest or rent  
\$ \_\_\_\_\_ Property taxes  
\$ \_\_\_\_\_ Repairs & maintenance, including strata fees

## Section I

### RENTAL INCOME - T776

\_\_\_\_\_ % Ownership of property with your spouse or \_\_\_\_\_  
\$ \_\_\_\_\_ Gross income - from each property  
\$ \_\_\_\_\_ Advertising  
\$ \_\_\_\_\_ Insurance  
\$ \_\_\_\_\_ Property management fees  
\$ \_\_\_\_\_ Mortgage interest  
\$ \_\_\_\_\_ Property taxes  
\$ \_\_\_\_\_ Repairs & maintenance  
\$ \_\_\_\_\_ Strata fees  
\$ \_\_\_\_\_ Travel  
\$ \_\_\_\_\_ Utilities