

Accombatax Tax Check-list (Year 2019)

Name

Contact Info:

Checklist

Existing Customer?

Personal Tax Return Checklist.....	2
General	2
T-Slips	2
Employment.....	2
Unemployed Or on parental Insurance.....	2
Investments Income	2
Investments (excluding RRSP accounts).....	3
Pension Income	3
Csst, Social Assistance	3
Partnership Income	3
Education, Loan , Scholarship.....	3
Rental Properties	3
Deductions?	4
1-RRSP contribution slips	4
2-Professional fees or union dues (if not on T4), Liability Insurance	4
3-Child Care Expenses	4
4-Interest on money borrowed to earn investment income	4
5-Safety deposit box (if you own investments).....	4
6-Investment management fees	4
7-Spousal or child support paid.....	4
8-Spousal or child support received.....	4
9-Employment expenses (auto / supplies / home office) (form T2200 required – signed by employer)	4
10-Moving expenses (T1M) if you moved 40 km closer to new place of work	4
NON-Refundable Tax Credit	5
Others	5

Accombatax Tax Check-list (Year 2019)

Personal Tax Return Checklist

General

<ul style="list-style-type: none">• Details of changes to personal status<ul style="list-style-type: none">◦ Marriage◦ Separation	<input type="checkbox"/>
<ul style="list-style-type: none">• Birthdates	<input type="checkbox"/>
<ul style="list-style-type: none">• Children birthdates	<input type="checkbox"/>
<ul style="list-style-type: none">• New address	<input type="checkbox"/>
<ul style="list-style-type: none">• Telephone number	<input type="checkbox"/>
<ul style="list-style-type: none">• Disabilities	<input type="checkbox"/>
<ul style="list-style-type: none">• Death	<input type="checkbox"/>
<ul style="list-style-type: none">• Last year's tax return (if this is our first year)	<input type="checkbox"/>
<ul style="list-style-type: none">• Last year's Notice of Assessment (NOA)	<input type="checkbox"/>
<ul style="list-style-type: none">• Property outside Canada More \$100,000 Cdn	<input type="checkbox"/>
<ul style="list-style-type: none">• Private drug insurance, date switched to or from Public Insurance RAMQ	<input type="checkbox"/>

T-Slips

Employment

T4 slips (Employment income)?	<input type="checkbox"/>
-------------------------------	--------------------------

Unemployed Or on parental Insurance

T4E Employment Insurance Benefits?	<input type="checkbox"/>
------------------------------------	--------------------------

Investments Income

Interest or dividends, Mutual fund income (T5,T3,T5008)	<input type="checkbox"/>
---	--------------------------

Accombatax Tax Check-list (Year 2019)

Investments (excluding RRSP accounts)

Stocks – Capital gains summary report (from broker) or transaction slips/details	<input type="checkbox"/>
Mutual Funds – Annual statement showing gains/losses for all investments sold, switched or exchanged during the year	<input type="checkbox"/>

Pension Income

T4OAS Old Age Security (age 65)	<input type="checkbox"/>
T4A(P) Canada or Quebec Pension	<input type="checkbox"/>
T4A Pension, retiring allowance	<input type="checkbox"/>
T4RIF Registered Retirement Income Fund	<input type="checkbox"/>
T4RSP Withdrawal from a RRSP	<input type="checkbox"/>

Csst, Social Assistance

T5007 Workers compensation, social assistance	<input type="checkbox"/>
---	--------------------------

Partnership Income

T5013 Partnership income	<input type="checkbox"/>
--------------------------	--------------------------

Education, Loan , Scholarship

T4A printed on AFE site	<input type="checkbox"/>
Details of any foreign income	<input type="checkbox"/>

Rental Properties

Details of owners/partners,	<input type="checkbox"/>
Gross revenue,	<input type="checkbox"/>
Advertising,	<input type="checkbox"/>
Interest,	<input type="checkbox"/>
Maintenance & repairs,	<input type="checkbox"/>
Office expenses,	<input type="checkbox"/>
Property taxes,	<input type="checkbox"/>
Travel costs,	<input type="checkbox"/>
Utilities.	<input type="checkbox"/>

Accombatax Tax Check-list (Year 2019)

Deductions?

1-RRSP contribution slips	<input type="checkbox"/>
2-Professional fees or union dues (if not on T4), Liability Insurance	<input type="checkbox"/>
3-Child Care Expenses Child care information, Payment RL24	<input type="checkbox"/>
4-Interest on money borrowed to earn investment income	<input type="checkbox"/>
5-Safety deposit box (if you own investments)	<input type="checkbox"/>
6-Investment management fees	<input type="checkbox"/>
7-Spousal or child support paid	<input type="checkbox"/>
8-Spousal or child support received	<input type="checkbox"/>
9-Employment expenses (auto / supplies / home office) (form T2200 required – signed by employer)	<input type="checkbox"/>
10-Moving expenses (T1M) if you moved 40 km closer to new place of work	<input type="checkbox"/>

Accombatax Tax Check-list (Year 2019)

NON-Refundable Tax Credit

Political contribution receipts	<input type="checkbox"/>
Tuition fees (post-secondary)	<input type="checkbox"/>
Donations to Charities	<input type="checkbox"/>
Medical expenses (drugs, dental, glasses, therapy, private health plan premiums Summarize by family member and exclude any amounts reimbursed)	<input type="checkbox"/>
First Home Buyer	<input type="checkbox"/>
Interest on student Loan	<input type="checkbox"/>
Child activity expenses Only For Quebec	<input type="checkbox"/>

Others

Parent living with you, you are not married	<input type="checkbox"/>
Elder living with you over 71 years old	<input type="checkbox"/>

Notes:

Please note the Checklist above is only for guidance as its based on our experience to ease document fulfillment process