

DATA REQUIREMENTS LIST – 2019 INDIVIDUAL INCOME TAX RETURNS

Please be sure to bring in all items that apply to you when you come in to have us do your tax return. Note that required slips and receipts often are not sent out until the end of March.

For All Taxpayers

- Date of any change in marital status and names and dates of birth of children born in the year
- Home Buyers Plan (HBP) and or New Home Buyers Credit
- Updated contact information, phone number or address change
- Did you change Banks? If so, we will need a new direct deposit form for CRA.

Information slips(s) for the following income:

- Employment (T4) **Note: If you did not receive a T4 slip, then bring pay stubs*
- Pension (T4A or T4PS)
- CPP/Old Age Security (T4A(P)/OAS)
- Employment insurance (T4E)
- Dividends or Interest (T5)
- Estates/Trusts/Mutual Funds (T3)
- Funds received from RRSP's (T4RSP or T4RIF)
- Slips for social assistance, worker's compensation or net federal supplements received in 2019
- Amounts of any tips or casual earnings for which no slip will be received \$ _____

Receipts for the following:

- RRSP contributions
- Union/Professional Dues
- Tuition fees – T2202
- Charitable donations
- Political donations

Documents for the following transactions:

- Legal papers related to any new or changed child support or alimony agreements
- Legal papers related to any property bought or sold (including sale of your home)
- Interest expense on any loans borrowed to earn investment, property or business income, or student loans
- Provide full details and agreements for any stock options exercised

Provide details of: (See our website www.gkcpa.ca for working paper templates)

- Deductible employment expenses – T2200
- Summary of revenue and expenses for each rental property owned
- Cost and description of any foreign property, share, cash, etc. holdings
- Details of income levels for a parent or grandparent you care for in your home
- Totals of alimony or separation allowances paid or received
- Child care expenses paid and the name and social insurance number of the person to whom they were paid
- Medical expenses for your family (If they might exceed 3% of your net income)
 - Include any required travel to a practitioner over 40 km from home.
 - Private medical plan premiums (Great West Life, Manulife, etc.)
 - Medical payroll deductions
- Farm account book or other records categorizing and summarizing revenue and expenses and GST
 - Listing of purchased livestock, grain, feed & fertilizer on hand at December 31, 2019 with its cost and fair market value
 - If you are participating in the Agri Invest/Agri Stability, please summarize your production cycle in preparation for filing the supplemental information forms (inventory worksheets) including opening and closing inventory balances, sales, purchases, and crop and livestock production.
 - Listings of all equipment additions & disposals and actual agreements for timber sales or well sites, easements, and seismic crossings.
- If you had any sales of shares or mutual funds, please fill out a schedule that identifies to us the sale, original cost and commissions as follows: (Active trading takes a lot of detailed work)

<u>NAME</u>	<u>QUANTITY SOLD</u>	<u>SOLD FOR</u>	<u>COST</u>	<u>COMMISSION ON SALE</u>	<u>COMMISSION ON PURCHASE</u>	<u>DATE SOLD</u>
xxx	xxx	xxx	xxx	xxx	xxx	xxx

Have you Moved?

Did you move 40 km’s closer to a new job during 2019, or to college, and you have earnings while in college? We need to know the costs of the move, including movers, vehicle expenses, meal expenses, lodging expenses, real estate commissions on the home sale and legal fees on the sale and purchase of your homes, also, mortgage payout penalties paid if any, as well as costs of carrying the former residence while vacant.

Donation Verification:

Please ensure that you have checked that any charitable donations are to valid charities.

The Canada Revenue Agency (CRA) website has a list of valid charities at:

https://apps.cra-arc.gc.ca/ebci/hacc/srch/pub/dsplyBscSrch?request_locale=en