

# ROLFE, BENSON LLP - 2019 PERSONAL INCOME TAX CHECKLIST

**PLEASE COMPLETE / SIGN THIS FORM AND RETURN TO US  
ALONG WITH YOUR TAX SLIPS/INFORMATION**

**IMPORTANT:**

(1) To help reduce the use and waste of paper, a copy of your tax return will be provided in electronic format.

You will **NOT** receive a copy of your 2019 tax return in paper format. If you would like a paper copy select YES.

Yes

(2) Please provide a copy of yours and family's 2018 NOTICE OF ASSESSMENT and any REASSESSMENTS and a copy of the CRA statement showing the instalments paid on account of 2019 tax.

**PERSONAL INFORMATION (Questions 1 to 4 - Complete for every family member)**

Name	Signature	(1) Canadian Citizen		(2) Elections Canada		(3) Foreign Property		(4) Foreign Trust	
		Yes	No	Yes	No	Yes	No	Yes	No
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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**Questions:**

(1) Are you a Canadian Citizen?

(2) Do you authorize the Canada Revenue Agency to give your name, address, date of birth and citizenship to Elections Canada to update the National Register of Electors?

(3) Did you own or hold foreign property at any time in 2019 where the total cost at any time was more than CAN \$100,000? (i.e. foreign bank accounts, shares in non-resident corporations, cryptocurrency, debt owed to you by a non-resident, interest in non-resident trust, intangible property rights, real estate outside of Canada)

(4) Did you ever loan or transfer funds or property to a non-resident trust or did you ever receive funds or property from, or have been indebted to, a non-resident in which you had or will have absolute or condition rights as a beneficiary, either directly or indirectly?

**Please note - there are substantial penalties for failing to report information from question (3) and (4) on your tax return.**

(5) Are you a US person (US citizen or Green Card holder)?

Yes  No

(6) Did you sell real estate in 2019? (If yes, provide details on page 2)

Yes  No

(7) Did you stop living in your principal residence and rent it out in 2019?

Yes  No

(8) Please ensure we have the full names and dates of birth for all children, dependants, and SINS if applicable: \_\_\_\_\_

**PRIMARY CONTACT INFORMATION (Have you moved?)**

Street Address \_\_\_\_\_ Home Phone \_\_\_\_\_

City \_\_\_\_\_ Province \_\_\_\_\_ Mobile Phone \_\_\_\_\_

Postal Code \_\_\_\_\_ Email address \_\_\_\_\_ Work Phone \_\_\_\_\_

EMPLOYMENT INCOME		
Employment income and benefits	T4	
Commission income	T4A	
Payments from DPSP or profit sharing plan	TRA/T4PS	
Severance pay or retirement allowance	T4A	
Tips, casual wages or part-time salary	T4, T4A, pay slip or summary showing amount received	

RETIREMENT INCOME		
Old Age Security	T4A(OAS)	
Canada Pension Plan /Disability benefits	T4A(P)	
Other pension or superannuation	T4A	
RRSP annuity income	T4RSP	
RRIF annuity income	T4RIF	
Other annuity income	T4A	
Foreign pension income	Foreign jurisdiction reporting slip / withholding tax details	

OTHER INCOME		
Income from a trust/mutual fund	T3 details of income and cost base adjustments	
Dividend income	T5	
Interest income	T5	
Other income/royalty income	T5	
Foreign income	Foreign jurisdiction reporting slip / withholding tax details	
Partnership income: limited or non-active partners	T5013	
Rental income/loss	Statement of rental income and expenses or Form T776	
Capital gains/losses	Original cost, proceeds of sale (T3/T5/T5008, broker gain/loss report)	
Principal residence disposition	Property address, year of acquisition, proceeds of disposition, statement of adjustment	
Alimony and support payments	Agreement details and amounts received	
Canada Savings Bond/other bond interest	T600/other	
Patronage allocation - Co-op/UFA	T4A	
Employment insurance benefits	T4E	
Working income tax benefit	RC210	
Worker's comp/Social Assistance	T5007	
Cryptocurrency transactions (i.e. Bitcoin)	Purchase/disposition details	

SELF EMPLOYMENT INCOME		
Business, professional or commission income	Details of all income and expenses or Form T2125	
Partnership income	Statement of partnership income and allocation or T5013.	
Farming	Details of all income and expenses or NISA Form	
Joint venture	Joint venture statements	

DEDUCTIONS		
RRSP	Contribution receipts	
RRSP rollovers or withdrawals	Details - including home buyers plan information	
Annual union, professional or like dues	T4 or receipts	
Childcare expenses	Details of payment/SINs where applicable	
Attendant care expenses	Receipts & details	
Employment expenses	T2200, details of expenses (i.e. auto, travel, entertainment)	
Carrying charges and interest expense	Details, purpose of loan & interest paid.	
Clergy residence deduction	T1223	
Alimony and maintenance paid	Agreement details & amounts paid	
Business investment losses	Details of investment in private corporation	
Moving expenses - selling and operating old residence	Details of move and all expenses	
Tax shelters	Bring or send details	
Other deductions	Bring or send details	

TAX CREDITS		
Spousal credit	Net income for spouse	
Disability credit (if 1st year of claim)	T2201	
Home accessibility tax credit - Costs to renovate your home to enhance mobility or reduce harm to a person eligible for the disability credit or 65 years or older	Provide expenses (i.e. wheelchair ramps, walk-in bathtubs, grab bars). (max \$10,000)	
Tuition fees	T2202 or TL11A for schools outside Canada	
Medical expenses	Receipts (prescriptions, dental, glasses etc).	
Donations	Official receipts	
Federal / Provincial Political contributions	Official receipts	
Interest on student loans	Statement of interest	
Venture capital credit	T5006, provide details	
Home buyer - 1st time buyer in 2019	Provide details	
Adoption expenses - each child under 18 years adopted in 2019.	Receipts from adoption organization	
Early educator school supply tax credit - Teacher or early childhood educator paid for eligible supplies used in the school or regulated child care facility.	Provide expenses (i.e. paper, flashcards, art supplies, stationary, games, puzzles, books). (max \$1,000)	

FOREIGN REPORTING		
Foreign assets including cash, real estate, investments in foreign companies, Cryptocurrency (i.e. Bitcoin).	For each property max cost in the year, cost at year end, income and gain/loss	
Property held in an account with a Canadian Securities dealer	For each investment, country, FMV at each month end, income and gain/loss.	
Transactions with foreign trusts	Provide details	
Foreign tax paid (credit)	Copy of foreign tax return and tax assessment	

Comments / list of items to be sent at later date: \_\_\_\_\_