

# Your 2019 Tax Checklist

Get ready  
for tax season  
with our 2019  
Tax Checklist.

Use this fillable PDF  
to ensure you have  
everything you need  
to file your return  
with minimal hassle.

## BASIC INFO

- Your name, birthday, social insurance number, marital status and province of residency
- Last year's tax return and Notice of Assessment
- If needed, same for your spouse and dependants
- Information related to being a US citizen or green card holder (if applicable)
- Details related to tax instalments paid in the year
- List of assets held outside Canada

## PERSONAL

- Childcare expense receipts
- Have you been approved by CRA for the Disability Tax Credit?
- Spousal support receipts
- Tuition slips (T2202A) for yourself or from a child
- Charitable donation receipts and carry forward information
- Political contribution receipts
- Medical receipts (over any 12-month period ending in 2019)

*Note: The federal government and most provinces no longer have tax credits for kids' activities and public transit (Ontario still has a transit credit for seniors)*

## INVESTMENTS

- RRSP contribution receipts
- Investment income tax slips (T5)
- Other investment income tax slips, such as for trusts (T3) and partnerships (T5013)
- Information on capital gains or losses related to investments (T5008 or investment statements) and loss carry-forward information
- Documents related to any disposition of real estate to determine the related capital gain/loss
- Information on transactions from prescribed rate loan arrangements
- Information on investment counsel fees and carrying charges
- Information for interest paid on money borrowed for investments
- Information related to previously filed tax elections

## EMPLOYMENT & PENSIONS

- Employment income (T4) and employee profit sharing (T4PS) slips
- Retirement Compensation Arrangement (RCA) payment (T4A-RCA) slips
- Employment Insurance slip (T4E)
- Pension, retirement and annuities income slips (T4A)
- Registered plan income (T4RSP & T4RIF) slips
- Old Age Security (T4A-OAS) and CPP (T4A(P)) slips
- Government income slips for social assistance or workers' compensation (T5007)
- Declaration of Conditions of Employment (T2200) signed by the employer
- Professional and union dues
- Moving expenses

## BUSINESS & RENTAL INCOME

- Tally of business income and expenses
- Tally of rental income and expenses
- Office-in-home expenses
- Automobile/travel logbook
- Details on the purchase of capital items (e.g. computers or equipment)

### Important Notice:

We are moving all IG Wealth Management accounts to a new digital platform to enable us to expand our service offering and online access to you for your IG accounts.

Depending on the activity within your account(s) this year, you may receive one or more tax receipts at year-end. These are not duplicate receipts and may look different from past receipts depending on the account for which they are issued. **Please ensure you report all issued tax receipts on your income tax.**



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