Volution LLP
Tax Advisors and Chartered Professional Accountants

Main Office: Suite 200 514 Stafford Drive N Lethbridge, AB T1H 2B2 Office: 403-328-1718

2018 Personal Income Tax Guides/Checklist

Please save this file to your desktop or documents prior to completing, and then once again when you've finished filling it in. Return this to Volution via email to info@volutiontax.ca, or print and include when you drop off your 2018 personal tax information.
By completing this list, we will be able to ensure your tax return is completed accurately and efficiently. Included in this checklist is information which could provide you with extra credits and benefits, so please be sure to highlight anything that your tax preparer should be made aware of prior to working on your tax returns.

Client Information

All new clients are requested to provide their 2017 personal tax return(s) as that will provide us with information on Date of Birth, Social Insurance Numbers and carry-forward information.

You Spouse *n/a attached coming*

Name ______________________ ______________________

Marital Status ☐ *Single Married Common-law* ☐ *Single Married Common-law*
☐ *Separated Divorced Widowed* ☐ *Separated Divorced Widowed*

Has this changed in the past year? No☐ ☐ *Yes, date:*

Address *Has your address changed in the past year?* ☐ *No Yes*☐*, updated as below*

____

Email Address ______________ ______________________
Do you want CRA to have your email address? ☐*Yes*☐*No Yes No*

Phone Number ______________ ______________________

Dependants *(Only required to update if changed from last year)*

Full Name	Date of Birth	S.I.N.	Income Amount

Have you made arrangements with CRA for direct deposit? ☐ *Yes No*☐
List new or updated accounts:

Branch # Institution # Account #

Additional Information

	You	Spouse
Are you a Canadian citizen? *Other:*	☐ Yes ☐ No	Yes No
Do you allow CRA to provide your information (name, address, & date of birth only) to Elections Canada? *(Canadian citizens only)*	☐ Yes ☐ No	☐ Yes ☐ No
Have you spent 183 days or more in any one country, other than Canada, during the past year? *Details:*	☐ Yes ☐ No	☐ Yes ☐ No
Did you buy or sell your principal residence during 2018? *All house sales must now be recorded on your tax return.*	☐ Yes ☐ No	☐ Yes ☐ No
Have you changed the use of your home from a principal residence to a rental property? *Details:*	☐ Yes ☐ No	☐ Yes ☐ No
Do you have a personal business that is registered for GST?	☐ Yes ☐ No	Yes No
Do you have a website which you earn income from? *Details:*	☐ Yes ☐ No	Yes No
Did you own foreign investments or property with a value over CAD$100,000 at any time during 2018 (excluding personal use, i.e. vacation home)? *Details:*	☐ Yes ☐ No	Yes No
Is there a financial planner we can contact regarding your investments? *Name & contact:*	☐ Yes ☐ No	Yes No
Are you a teacher or early childhood educator?	☐ Yes ☐ No	Yes No

Please ensure all your T-slips have been provided to us upon filing. If you are missing any slips, CRA can penalize you upto 50% of the tax that is owing on the income reported on any missing slips. If you receive any additional slips, you will need to amend your tax return to avoid any penalties or interest that CRA may charge.

A fee will be charged for time accumulated in file to amend any tax returns, or to deal with any income tax audits that arise as a result of this filing.

By signing and dating, you hereby confirm that all slips have been provided to us at this time of filing your 2017 personal income tax return.

Name Signature Date

Name Signature Date

Volution LLP
Tax Advisors and Chartered Professional Accountants

Main Office: Suite 200 514 Stafford Drive N Lethbridge, AB T1H 2B2 Office: 403-328-1718

2018 Personal Income Tax Guides/Checklist

We want to help you get every tax credit and deduction you're entitled to. To assist you in assembling your financial information for preparation of your income tax return, keep this checklist handy. Complete and return it to us together with the financial information and applicable receipts you have assembled. (Check all that apply) Please advise us of any income from related business, whether through a corporation, partnership or trust, which is subject to TOSI.

Personal Income Tax Checklist

Slips

- ☐ Employment income (T4 slip)
- ☐ All other income information slips (T3, T4A, T4PS, T5, T5013, T5018)
- ☐ Old Age Security (T4A-OAS) and CPP benefits (T4A-P)
- ☐ Other pensions and annuities (T4A, T4RIF,
- ☐ T4RSP) Employment Insurance benefits (T4E)
- ☐ Social assistance and Workers' Compensation benefits (T5007)

Other Income

- ☐ Other employment income not reported on slips, including tips
- ☐ Self-employment income: business/professional/commission/farming income AND business expenses
- ☐ Partnership income and expenses
- ☐ Rental income and expenses
- ☐ Alimony, separation allowances, child maintenance (only if taxable by court order)
- ☐ Scholarships, fellowships, and bursaries (T4A)
- ☐ Capital gains and losses realized (include annual trading summary and T5008)

Foreign Income & Property

- ☐ Foreign income
- ☐ Foreign pensions
- ☐ Details of foreign property owned at any time including cash, stocks, trusts, partnerships, real estate, etc. if over CAD$100,000 - excluding personal-use property

Deductions

- ☐ Employment related expenses (T2200)
- ☐ Interest on money borrowed to purchase investments, investment counsel fees
- ☐ Moving expenses - including costs of maintaining a vacant former residence
- ☐ Tool expenses (tradespersons & apprentice mechanics)
- ☐ Other employment expenses
- ☐ Alimony, separation allowances, child maintenance (only if deductible by court order)
- ☐ Registered Retirement Savings Plan (RRSP) contributions (including Jan/Feb 2017)
- ☐ Professional or union dues
- ☐ Northern residents deductions

Dependants

- ☐ Child care expenses
- ☐ Adoption expenses

Personal Income Tax Checklist, Continued

Tax Credits

- ☐ Tuition / education fees (T2202, T2202A, TL11A, TL11D) for you or a dependent (including exams for professional certification)
- ☐ **Charitable donations**
- ☐ Political contributions
- ☐ Medical expenses for you or a family member
- ☐ Amount paid for monthly public transit (Jan-Jun)
- ☐ Interest paid on qualifying student loans
- ☐ New Home Buyers' tax credit
- ☐ Disability tax credit (yourself, spouse or dependent)
- ☐ Home renovation expenses (seniors & disabled)
- ☐ Volunteer Firefighter tax credit
- ☐ Search & Rescue volunteers
- ☐ Teacher or Early Childhood Educator tax credit

RRSP Plans

- ☐ Home Buyers' Plan withdrawal/repayment
- ☐ Lifelong Learning Plan repayment

Additional Documentation

- ☐ Notice of Assessment/Reassessment
- ☐ Canada Revenue Agency correspondence
- ☐ Sale or deemed sale of stocks, bonds or real estate
- ☐ Prior 2 years tax returns (new clients)

Key Deadlines in 2019

Jan 30: Interest payment on inter-spousal loans

Feb 28: Filing of 2018 T4, T4A, T5 slips and summaries

Feb 28: 2017 RRSP contributions including annual repayment of RRSP Home-Buyers withdrawal

Mar 15: First personal tax installment for 2019

Mar 31: T3 slip and T3 trust return for calendar year end trusts

April 30: 2017 T1 personal income tax return (if not self-employed) and payment of any outstanding tax balance (whether self-employed or not)

Jun 15: 2018 T1 personal income tax return, if self employed

Jun 15: Second personal tax installment for 2019

Sept 15: Third personal tax installment for 2019

Dec 15: Final personal tax installment for 2019

Questions?

Please contact your Volution Tax Advisor at 403-328-1718.

Once form is completed, please print & drop off with your personal tax information slips. Alternatively, email the completed and saved form to your accountant at Volution, or email to info@volutiontax.ca.

We appreciate your business!