

Keeping the Books Inc.

Required Documentation Checklist

Preparing your 2019 Personal Income Taxes

In order to finalize your personal income tax return, we will require from you information necessary to complete your T1 General and to comply with the gathering of documentation to comply with the rules and regulations of Canada Revenue Agency

NOTE: If you are missing documentation, please send in what you have (but make a comment to us that you have more documentation coming), so that we can prepare your return prior to the due date. Any missing items can be adjusted later by preparing a T1 adjustment.

2018 Notice of Assessment

Employment Income - T4 slip	Support Payments Made (Provide legal documents if first time process)
Old Age Security (OAS) - T4A slip	Exploration & Development Expenses (T1229) form
Canada and/or Quebec Pension (CPP or QPP) T4A(P) slip	Payments to Public Transit (65 and over)
Child Care Expenses (Schools, Camps, etc)	Interest paid on Student Loans
Moving Expenses	Tuition Fees (T2202A) form
Elected Split Pension Amount (T1032) Form	Donation Receipts
Employment Insurance & Other Benefits (T4E) slip	Detail of purchase of tools for your job
Dividend and Interest Income - (T5) slip	Details of home buyer plan repayment provisions
Income from Trust (T3) slip	Partnership Income (T5013) form
Rental Property - Address of Property - # of Units require total income received + breakdown of expenses	Amounts paid by installments to CRA
Capital Gains - Marketable Securities (Stocks and/or Real Estate) documents of purchase & sale	Property Taxes - Rent Paid and to whom
Registered Retirement Income R.R.S.P. (T4RSP) slip	Political Contribution Receipts
Registered Income Fund (T4RIF) slip	Disability Tax Credit (T2201) form
Self employment income	Employment Expenses
Commission	Vehicle Expenses - Total KMS driving including log
Farming	Changes to personal status - i.e. address, Marriage, birth, separation etc.
Please supply income + breakdown of related expenses	Details of people you support and their Medical status
Workers' Compensation (T5007)	Carry Charge (Safety Deposit box, Interest, Etc.)
Registered Retirement Contribution - slip or slips	Caregiver Renovation
Union, Professional Dues Paid	Other _____