



LOUIS T. PICCO INC\*  
CHARTERED PROFESSIONAL ACCOUNTANT

## PERSONAL TAX RETURN CHECKLIST

The following checklist is to assist you in determining the information you need for your personal tax return:

1. Your (previous year's) Notice of Assessment from the Canada Revenue Agency (CRA).
2. All income information slips such as T3, T4, T4E, T4F, T4A, T4U, T5, etc.
3. A listing of all other sources of income such as alimony, scholarships, fees, foreign source income, and Canada Savings Bonds.
4. **Details on any foreign assets you own that are over \$100,000 THIS IS VERY IMPORTANT: As there are large fines for not reporting your foreign assets.**
5. Tuition and education credit certificates – T2202/T2202A (signed on the back of both copies) and any tuition fee receipts.
6. A statement of professional/business/rental income or all receipts, invoices, expenses, etc. required for the preparation of such statements.
7. A schedule of disposition of any capital assets during the year, showing the details of the sale and information, re: original cost or valuation day values.
  - **For 2018, the sale of your principal residence also needs to be recorded as a disposition.**
8. The financial statements of any partnerships, etc. with which you are involved.
9. The details on carrying charges and interest expense relating to any business or investment opportunities.
10. The official receipts for contributions to Registered Retirement Savings Plans or Registered Pension Plans. They must be the **OFFICIAL** receipts.
11. A list of your childcare expenses, including the social insurance number and address of the babysitter/care provider.

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12. A list of your charitable donations, together with applicable receipts.
13. A statement of your medical expenses, together with the applicable receipts. Please note, your B.C. MSP premiums are not eligible. You may claim private health care premiums, eyeglasses, hearing aids, medical aids, dental work, prescriptions, hospitalization and ambulance service, to name a few. From these expenses we must deduct any amount that you recovered from a private or government medical plan. If you are not sure if some of your receipts are deductible, include them with the rest of your receipts just in case they are.
14. The total amount of the installment payments you made to the Canada Customs and Revenue Agency during the year.

This list is not all-inclusive, but it should help you provide us with most of the information that we will need. If you can give us all of the above material at one time, it will undoubtedly help to keep any increase in time and costs as small as possible.

**We appreciate all your assistance in organizing your personal tax information!**

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