

PERSONAL TAX CHECKLIST 2018

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Name: _____
Address: _____

E-mail: _____

Tel. No: _____
S.I.N: _____
Birthdate: _____
Marital Status: _____
Spouses Name: _____
Spouses S.I.N: _____
Spouses Birthdate: _____

DEDUCTIONS/CREDITS

DID YOU SELL YOUR PRINCIPAL RESIDENCE DURING THE YEAR? _____
If so, provide the statement of adjustments for the sale
Employment expenses Form T2200 must be completed by your employer (see back page) _____
Commission expenses (e.g. automobile, promotion and entertainment, travel, supplies, samples, home office) – enter on next page _____
RRSP contributions: \$ _____ (attach receipts) _____
Lump sum transfer to RRSP _____
Withdrew RRSP funds to purchase a qualifying home or education expenses: \$ _____ Date: _____ (provide full details) _____
Union or professional dues (attach receipts) _____
Alimony or maintenance (provide name, address, S.I.N # and amount paid) _____
Moving expenses (provide full details and receipts) _____
Child care expenses (provide name, address, S.I.N # and amount paid) _____
Tuition fees for yourself and/or your dependents (attach receipts) _____
First time homebuyer during 2018? _____
BC Seniors Home renovation expenses _____
Federal and Provincial political contributions _____
Carrying charges in respect of investment income _____
Tax shelter purchases (attach T5013 / T101) _____
Disability credit (disability credit certificate required in current or prior years) _____
Student loan interest expense _____
Unreimbursed medical and attendant care expenses for self or other dependents _____
Charitable donations (attach receipts) _____
Accounting fees paid for tax planning or related to investments _____
Other deductions _____

ADDITIONAL COMMENTS, MISSING INFORMATION AND NOTABLE CHANGES FROM 2017

BUSINESS INCOME AND EXPENSES

EMPLOYEE AND COMMISSION EXPENSES

BUSINESS INCOME AND EXPENSES

EMPLOYEE AND COMMISSION EXPENSES

Name of business: _____

Address: _____

For the period: _____ to _____

Are you registered for and do you charge GST/HST? _____ Yes _____ No

REVENUE \$ _____

(Please see ** below)

EXPENSES

Cost of goods sold \$ _____ \$ _____

Advertising and Promotion _____

Bad debts _____

Bank charges and interest _____

Business license, tax and dues _____

Courier and delivery _____

Insurance _____

Meals and entertainment _____

Management and administration fees _____

Office (supplies, postage, etc.) _____

Rent and property taxes, (excl. home office) _____

Supplies _____

Telephone (line, cell, fax) _____

Travel _____

Wages and benefits _____

Utilities (exclude home office) _____

Others _____

Automobile See Auto Expense on next page

See Auto Expense on next page

Home office See Home Office on next page

See Home Office on next page

**** If you are registered for GST/HST, the revenue should exclude GST/HST collected, and the expenses should exclude the input tax credit amount.**

FIXED ASSETS PURCHASED DURING THE YEAR

	Amount	
Equipment	\$ _____	\$ _____
Furniture and fixture	_____	_____
Computers - hardware	_____	_____
Computers - software	_____	_____
Others _____	_____	_____

AUTOMOBILE EXPENSES FOR THE YEAR	HOME OFFICE EXPENSES FOR THE YEAR
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Gas _____	Rent _____
Insurance _____	Mortgage interest _____
Repairs and maintenance _____	Property taxes _____
Parking _____	Maintenance/strata fee _____
Car wash _____	Repairs and maintenance _____
License and registration _____	Utilities _____
Interest on financing _____	Insurance _____
Lease payments _____	
Value of Automobile _____	
Purchase of Automobile _____	
during the year _____	
No. of km - Business _____	% of home office _____
No. of km - Total _____	

*Only fill in if claiming automobile expenses or home office expenses as required by employment or if self-employed

RENTAL INCOME AND EXPENSES

ADDRESS OF RENTAL PROPERTY _____

NUMBER OF UNITS _____

Rental Income _____	Accounting and Legal _____
Expenses _____	Property Tax _____
Advertising _____	Travel _____
Insurance _____	Utilities _____
Repairs and maintenance _____	Interest expense _____
Management and administration _____	Strata fees _____
	Assets purchased _____
	Other (Specify) _____

FOREIGN ASSET REPORTING

If you owned foreign property with a cost of greater than \$100,000 during 2018 such as vacation homes, foreign bank and securities accounts, shares of foreign companies, interests in foreign trusts or partnerships or interests in any property listed above, please describe. Please review our reporting letter for new changes to this form in 2018, especially regarding simplified reporting.