

**PEVERILL & ASSOCIATES INCORPORATED CHARTERED ACCOUNTANTS**

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## **PERSONAL INCOME TAX RETURN CHECKLIST 2018**

\*\*\*Unless we have the information to complete your return by April 15th, we cannot guarantee that it will be completed before April 30th. \*\*\*

### **THE FOLLOWING SLIPS MUST BE FILED WITH CANADA REVENUE AGENCY :**

- T4 slip from each employer during 2018
- T5 slip for all interest and dividends received in 2018
- Receipt for each charitable donation made in the year
- Old Age Security received
- Print-out for each medical expense paid in the year (you can get an annual summary from your pharmacist, dentist, etc.)
- T4A for any pension received in the year
- Receipt for all RRSP contributions made in year or by March 1, 2019
- T2202A form for tuition receipts
- T3 slips for any income from mutual fund investments
- **Medical and dental premiums paid in 2018, make sure this number does not include life or disability insurance.**

### **RECEIPTS DO NOT HAVE TO BE SENT FOR THE FOLLOWING INFORMATION BUT SHOULD BE KEPT ON FILE :**

- Child care expenses, including Social insurance number and name of caregiver.
- Receipts for interest paid in the year on student loans.
- Details on the purchase price and proceeds on any investments sold in the year.
- If you sold a house in 2018, year of purchase and the proceeds received.

### **THE FOLLOWING INFORMATION IS REQUIRED IF YOU ARE CLAIMING EMPLOYMENT EXPENSES :**

- T2200 from your employer, including business mileage and personal mileage is claiming vehicle expenses
- Totals for each expense that you are claiming such as gas, travel, office, advertising, etc.
- Meals and entertainment amounts

### **ADDITIONAL INFORMATION THAT WE REQUIRE :**

If you are a new client please provide us with your 2017 Notice of Assessment. This is the form that was sent back to you after you filed your 2017 income taxes.

### **OFFICE HOURS :**

For the months of March and April: 8:30am – 5:30pm

For the months of May and June: 8:30am – 4:30pm