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2019 Simplified Checklist
Personal Income Tax Return

HELP US BETTER ASSIST YOU

We have prepared this simplified checklist for our clients who have a personal tax situation that doesn't change much from year to year and who already know what information they need to provide us with. If you are uncertain or if you simply wish to verify if additional information is required, you can consult our complete checklist as well as the additional schedules (also on our website).

Please take a few minutes to answer the following questions and provide us with any comments concerning your personal situation in the "additional information" section.

Other than the 2019 tax information slips and details for your income and documents supporting the deductions you are claiming, including the RRSP slips for the contributions made in the first 60 days of 2020, you may need to provide us with additional documents if you are eligible for one of the new credits available. Please consult the **"What's New for 2019"** schedule to find out more about these credits.

We would greatly appreciate it if you would forward to us a duly completed copy of this checklist, together with paper copies of all information slips and other documents required for the preparation of your income tax return as pictures forwarded from smart phones are often unreadable, which can result in errors and delay the completion of your return. Please note that all your original documents will be returned to you.

As we are going green, we will forward the copies of your tax returns to you by PDF, together with any documents to be signed and returned to us, unless you have previously indicated to us that you wish to continue receiving a hard copy of these documents.

YOUR PERSONAL SITUATION

YOU (so we can confirm your coordinates)

Name: ____________________

Address: ____________________

Home number: ____________________

Work number: ____________________

Cell number: ____________________

Fax number: ____________________

Email: ____________________

MARITAL STATUS

○ Single[1] ○ Married* ○ Divorced[1]
○ Common-law[1] ○ Separated[1] ○ Widowed[1]

* If you are married, what is your matrimonial regime?

○ Partnership of acquests ○ Community of property
○ Separation as to property

Has your marital status changed during the year?

○ Yes ○ No

Date of change (mm/dd): ____________________

[1] Did you live alone or only with minor or dependent children attending post-secondary school throughout the entire year?

○ Yes ○ No

YOUR SPOUSE

If tax returns are not prepared by us:

Name: ____________________

Date of birth: ____________________

S.I.N.: ____________________

Net income of your spouse

As per line 23600 (federal): ____________________

As per line 275 (Québec): ____________________

2019 Simplified Checklist
Personal Income Tax Return (cont'd)

YOUR PERSONAL SITUATION (cont'd)

FOREIGN PROPERTY (see "Foreign Property" schedule)

At any time during the year, did you own foreign property with a **total cost** of more than $100,000 CAD? *(If yes, please provide details.)* ○ Yes ○ No

DISPOSITION OR DEEMED DISPOSITION

The disposition of a principal residence, land or other property must be reported (sale or transfer).

Did you dispose of a principal residence, land or other property in 2019? ○ Yes ○ No
(If yes, please provide details.)

A deemed disposition must also be reported on your income tax returns. A deemed disposition can occur when you have a change in the use of a property. For example, if a rental property (or part of a rental property) starts being used as a principal residence or, conversely, if you start renting your principal residence.

Did you change the use of a property in 2019? ○ Yes ○ No
(If yes, please provide details.)

QUÉBEC RESIDENTS ONLY

CONTRIBUTION TO THE QUÉBEC PRESCRIPTION DRUG INSURANCE PLAN

Were you (and your spouse, if any) covered by a group insurance plan for prescription drugs for the entire year?* ○ Yes ○ No
** If you were covered by the RAMQ's public insurance plan, please answer "No".*

If you were covered for only **part of the year,** please provide the period of coverage: From: ____________________

To: ____________________

REFUND TRANSFERRED TO SPOUSE

Québec only:

If you are allowed a refund, and your spouse has an amount due, would you like to apply all or part of your refund to pay the amount due by your spouse? ○ Yes ○ No

If your spouse has a refund, and you have an amount due, can we transfer all or part of the refund to pay for your amount due? ○ Yes ○ No

ADDITIONAL INFORMATION

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Thank you!