GREGORY HARRIMAN & ASSOCIATES LLP
CHARTERED PROFESSIONAL ACCOUNTANTS

Personal Tax Checklist 2018 *(One form per couple/Children over 18 complete their own)*

Personal Tax Returns will NOT be efiled without payment and required signatures.

Office hours for March & April Saturdays from 10 - 2PM

Saturday April 27, 2019 & Sunday April 28, 2019 10-2PM

CONSENT TO USE PERSONAL INFORMATION & OTHER IMPORTANT MATTERS

Gregory, Harriman & Associates LLP is authorized to retain the current personal and/or financial information and historical personal and/or financial information for as long as it may be required by legislation, i.e. the Income Tax Act, and/or as may be required to document future support program applications and/or future external financing applications and doing so thereafter for a reasonable period of time. I acknowledge my right to access the applicable personal and financial information collected by Gregory, Harriman & Associates LLP by contacting the Privacy Officer.

Name: ___________________________________ **Spouse:** ________________________________

Signature: ________________________________ **Signature:** ______________________________

If you moved in 2018/2019 provide new address: ____

Have you sold/transferred a real estate property in 2018?
(including principal residence) ☐ **Yes** ☐ **No**

If yes, what was the gross sale of proceeds? ______________________ **Date of Sale?** _____________

Do you and your spouse authorize CRA to provide information to Elections Canada? : ☐ Yes ☐ No

Are you a Canadian Citizen: ☐ Yes ☐ No * ☐ Dual* Spouse: ☐ Yes ☐ No * ☐ Dual

*If no, please state what other citizenship you/spouse hold: ____________________________________

Marital Status: ☐ *Married* ☐ *Widowed* ☐ *Divorced* ☐ *Common-law* ☐ *Separated* ☐ *Single*

If marital status has changed during the year, provide date of change (YY-MM-DD): _____________

List any Dependents who were born/adopted in 2018:

*DOB*________________ *Name*___________________________ *Son or Daughter* _________________________

Do you, your spouse or any of your dependents qualify for the Disability Tax Credit? ☐ Yes ☐ No

How would you like your 2018 Personal Tax Return Copies returned to you?

☐ Pick up at GH&A ☐ E-Courier * ☐ Express Post ($40.00)

*** To set up new e-courier account provide email address & phone #:** ________________________________

Do you or your spouse own/hold foreign income generating property/securities costing more than a $100,000 CAD?

☐ **YES *** ☐ **NO** ***(does not include RRSP assets)*** *** (If yes, form T1135 will be required at an additional cost)**

Have you spent more than 120 days in the United States in any of the last 3 years? If yes, please provide the number of days per calendar year : 2018___________ 2017 ___________ 2016 ____________

☐ **GHA LLP to prepare IRS form 8840 if required** ☐ **Client to prepare their own 8840 form**

INFORMATION SLIPS – Ensure all T-Slips are provided

☐ Employment and Other Income - T4, T4A	☐ T slips – (T4A, T4A(P), T4A(OAS), T4E, T5007)
☐ Do you have any Tips & Gratuities to report? $______________	☐ Investment/Interest (T5, T3, T5013 partnership income, T101, Bitcoin other cryptocurrency transactions)
☐ Pension Retirement (T4RSP, T4RIF)	☐ Foreign Slips – Investment/Employment/Pension

Do you expect to receive any additional slips? Yes ☐ No ☐ - If yes, please provide as soon as you receive them

SELF-EMPLOYMENT INCOME (FARMING/BUSINESS/PROFESSIONAL/RENTAL) *go to page 4 or to www.gh-a.com*

Farming Reminder Checklist ☐ *Business/Professional Income Checklist* ☐ *Rental Income Checklist* ☐ *GST Filing*

INVESTMENTS ☐ N/A

☐ Trading Summaries from Broker for realized gains/losses	☐ Interest paid on investment loans
☐ Investment Counseling/Management fees	☐ Income/Gains/Losses for Securities held outside brokerage

Can we contact your investment advisor: ☐ Yes ☐ No * If yes, please provide advisor's information:

Name :____________________________ phone number:_________________ e-mail:__________________________________

DEDUCTIONS AND CREDITS - IF APPLICABLE ALL RECEIPTS/SLIPS MUST BE PROVIDED

☐ RRSP Contributions up to March 1, 2019	☐ Union and Professional Dues
☐ Volunteer Firefighter Credit *(over 300 hours)*	☐ Donations *(charitable/political)*
☐ Home Accessibility Tax Credit *(over 65 years or disabled)*	
☐ Tuition Slip & Exam fees (T2202 – outside of Canada TL11A) ***If the credit is to be transferred advise: spouse*** ☐ ***parent*** ☐ ***grandparent*** ☐	
☐ Student Loan Interest	☐ Child Care (including day/summer camps)
☐ Alimony/Maintenance-Exclude Child Support	☐ Canada Caregiver Credit (Infirm family member)
☐ First Time Home Buyers Credit	
☐ Educator School Supply Credit	
☐ Moving Expenses – *Employment/Business/ Students (GH&A LLP will need to determine if you are eligible)*	
☐ Employment Expenses *(a signed T2200 must be provided)-GH&A LLP will need to review to advise what is available for deductions*	

Medical Expense Checklist

☐ Private Health Care Costs/Attendant Care & Group Home (attach receipts)

☐ Other Dental & Medical (receipts of health plan expense coverages)

☐ Travel Costs (if over 40 km one way) – provide listing of trips, dates and mileage – see Medical Mileage Appointment Worksheet

☐ Meals (if travel over 80 km one way) – provide listing of trips, dates and mileage

☐ Prescriptions – **(detailed listing from pharmacy including RX#, Drug Name, DIN #, & Doctor's Name)**

☐ Other Medical Expenses (attach receipts) – see www.gh-a.com for listing of eligible medical expenses and authorized medical practitioners

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Canada's Anti-Spam Legislation (CASL)

Gregory, Harriman & Associates LLP #104, 331-3rd Avenue, Strathmore, Alberta requests to use your email contact address to send you information electronically. This information may include invoices, statements, tax updates, firm events or client information.

For each category listed below select either subscribe which will authorize us to contact you electronically or select unsubscribe and we will not contact you electronically:

Invoices and/or statements Subscribe _________ Unsubscribe ___________

Tax updates, firm events, general client information Subscribe __________ Unsubscribe ____________

____

Clients Name

____

Clients Signature

____

Email address

____

Date

Consent may be updated at any time by contacting us at the information provided on this form or mailbox@gh-a.com

GST RETURN – DO YOU WANT GH&A TO PREPARE FOR 2018? ☐ **YES *** ☐ **NO**

Are you an annual or quarterly filer: ☐ **Annual** ☐ **Quarterly**

If you are providing data: Quickbooks/Simply/Sage/AgExpert we will need the following:

Version: ______________ Year: ______________ Login: ____________ PW: _____________

Very important to provide Year and Password.

In Home Office Expenses Worksheet 2018 provided on our website: www.gh-a.com

☐ Business/Professional/Farm - Self Employment Income Checklist ☐ - all information provided in data

☐ **Income (Including - Sharing Economy – Uber etc.) $ ______________________________** *(if not provided in data)*

☐ Advertising	☐ Interest/Bank charges	☐ Supplies
☐ Insurance	☐ Office Supplies	☐ Utilities
☐ Meals/Entertainment	☐ Rent	☐ Management/Administration
☐ Legal/Accounting	☐ Cell Phone	☐ Travel
☐ Telephone/Gas	☐ Capital Asset Purchases	☐ Property Taxes
☐ Salaries	☐ Repairs & Maintenance	☐ Business Taxes, Licenses, Dues, Membership fees
☐ Automobile *(see Automobile Expenses checklist below)*		☐ Home Office *(go to Resources, Personal @ www.gh-a.com)*

☐ Should you earn income from a website, CRA requires disclosure. web address: ________________________________

☐ Farming – Checklist

☐ Land Sale/Purchase *(all documentation)*	☐ Equipment Sales/Purchase *(receipts/invoices)*
☐ Loan Documentation *(agreements/schedules)*	☐ Agr 1 slips
☐ Grain Advance Documentation	☐ Feeder Loan Cards
☐ New Surface/Pipeline Agreements *(receipts/compensations summaries)*	☐ See Business/Professional Checklist below for common expenses

☐ Rental- Self Employment Income Checklist ☐ - all information provided in data

☐ **Rent collected (AirBnB/VRBO) $ ______________________________** *(if not provided in data)*

☐ Advertising	☐ Utilities	☐ Management/Administration
☐ Insurance	☐ Mortgage Interest	☐ Major Renovations & Purchases
☐ Condo Fees	☐ Office Supplies	☐ Cell phone
☐ Legal/accounting	☐ Property Taxes	☐ Repairs & Maintenance
☐ Travel/vehicle expenses for property management	☐ Sale /Purchase of Rental Property *(provide Statement of adjustments for purchase and sale/legal costs/commissions)*	

☐ Automobile Expense Checklist *(please ensure that you have kept a log of KM driven during the year)*

Total KMs driven in the year for: Business _________ Personal _________

☐ Fuel and oil	☐ License and Registration	☐ Interest on Vehicle Loan
☐ Repairs and Maintenance	☐ Parking Fees	☐ Insurance ☐ Leasing Costs

If vehicle was disposed of in the year please provide details/invoice Proceeds _____________ Date Sold _____________

If new vehicle purchased during the year provide details/invoice/loan agreement
Year/Make _________________ Purchase Price _________________ Date Purchased _________________

If leasing a new vehicle during the year provide details/invoice/lease agreement
Year/Make _________________ Purchase Price _________________ Date Leased _________________