

2019 Tax Season

Tax Season Checklist

Prepared at Simplekeeper



www.simplekeeper.ca/2019

info@simplekeeper.ca

Welcome to your 2019 package

In order to expedite your tax package before the deadline of April 30, 2020, please take some time, at your earliest convenience, to send us the PDF version of the documents outlined below by email or via hard copy by mail at:

info@simplekeeper.ca

Attn: Alicia Barchecheat

5555 Westminster #213,
Cote-Saint-Luc, Quebec,
H4W2J2

Notable Dates For 2019 Season

- March 1 2020: Tax Season Begins
- April 30th 2020: Filing Deadline for Individuals
- June 15 2020: Filing Deadline for Self-Employed Individuals
- April 30th 2020: GST/QST Deadline

Reminder: Please send your summary in Excel or PDF Format.

Don't have time to categorize bills and summarize expenses?
Ask about personal bookkeeping (subject to additional costs).

Need to book some time for a visit?

Book us at simplekeeper.ca/2019



All documents must be received
by or before Wednesday April
1st 2020 to ensure the filing
deadline for your file is met.

Please send us all of the applicable documents below

Item	Applicable?	Sent?
Employment Income – T4/RL-1		
Trust Income – T3/RL-16		
Investment Income – T5/RL-3		
Old Age Security – T4A OAS / RL-2		
QPP Benefits – T4A(P) / RL-2		
Commission / Business – T4A		
RRSP / RRIF Income – T4RSP / T4RIF / RL-2		
Employment Insurance Benefits – T4E / RL-6		
2018 Income Tax Returns		
RRSP Contribution Slips		
Medical Expenses		
Childcare Expenses – RL-24 / RL-30		
Donation Receipts		
Annual Union Dues		
Tuition / Textbook Fees – T2202 / RL-8		
Information About Eligible Dwellings - RL-31		
Other Benefits & Compensations – T5007 / RL-5		
2018 Provincial & Federal Notices of Assessment		

Rental, Self employment & Uber Income: See below sections

Self Employment Income

Please send us all of the applicable documents below

Income	Sent?
Professional / Business Income – <i>per month</i>	

Deductible Expenses	Applicable?	Sent?
Purchases		
Advertising		
Meals & Entertainment		
Insurance		
Interest		
Licenses		
Memberships		
Office Expenses		
Office Supplies		
Professional Fees		
Rent		
Salaries & Wages		
Taxes		
Travel Expenses		
Utilities		
Motor Vehicle Expenses		
Business Use of Home Expenses		

Rental Income

Please send us all of the applicable documents below

Per Rental Property	Sent?
Address	
Income <i>per month</i>	

Deductible Expenses (per rental property, per month)	Applicable?	Sent?
Advertising		
Insurance		
Interest		
Office Expenses		
Professional Fees		
Management Fees		
Maintenance & Repairs (incl. Renovations)		
Property Taxes		
Travel Expenses		
Utilities		
Purchase of Appliances		

Uber / Uber Eats Income

Please send us all of the applicable documents below

Uber Tax Summary	Sent?
Uber Tax Summary - <i>shows details for revenues and charges for 2019</i>	

GST / QST Form	Sent?
GST / QST Form - <i>sent by mail from Revenue Quebec</i>	

Motor Vehicle	Sent?
Vehicle make, model, year	
Purchase / lease agreement	
Total number of kilometers driven in 2019	
Total number of kilometers driven in 2019 for income purposes (ex. Uber)	

Deductible Expenses	Sent?
Gas & Oil	
Parking	
Insurance	
License & Registration	
Maintenance & Repairs	
Interest	
Lease Cost	
Purchase of Props For Vehicle (ex. water bottles, chargers, fans, etc.)	
Advertising	
Telephone	
Insurance Deductible Following An Accident	

Partnerships

Simplekeeper often collaborates with various professionals in the service world to serve you better. Our partners for the 2019 year can be found below. We are happy to make an introduction at any time.



SFL - Gestion de Patrimoine

Avraham Aviad Teboul – 514-483-2070,303

Personal and corporate tax optimization, asset management, estate & retirement planning



Fyon Financial

Alexandre Fyon – 514-679-3966

Life, critical, health, dental, travel insurances. Retirement savings plan (RRSP), education savings plan (RESP), wealth management, planned donations and estate planning



Groupe Conseil Larouche & Associés

Charles Barchechat – 514-999-7302

Corporate financing, SMB financing, strategic planning & budgeting, corporate recovery & reorganization, loan & bursary assistance

2019 T1 Questionnaire

This sheet must be filled out by every new client in 2019. Returning clients must fill out the full questionnaire below if there has been any change in situation, in 2019 (e.g. address, marital status, residency status, etc.)

Personal information

First Name _____ E-mail address _____

Last Name _____ S.I.N _____

Date of Birth _____ Phone Number _____

Address _____ City _____

Postal code _____ Residency status Resident Citizen Deemed Resident

Are you covered by any kind of private/group insurance? Yes No
If your status changed in 2019, please indicate the date of the change: _____

Marital status Single Married Separated Divorced Widowed Livinder under common law

If your marital status changed in 2019, please indicate the date of the change: _____

Did you dispose of a princial property in the 2019 year? Yes No

Do you own foreign assets (i.e.stocks, property, real estate) that have a cost over CAD\$100,000 as of December 31 2019? Yes No

Spouse's information

First Name _____ E-mail address _____

Last Name _____ S.I.N _____

Date of birth _____ Phone Number _____

Are you covered by any kind of private/group insurance? Yes No
Residency status Resident Citizen Deemed Resident

Did you dispose of a princial property in the 2019 year? Yes No
If your status changed in 2019, please indicate the date of the change: _____

Do you own foreign assets (i.e.stocks, property, real estate) that have a cost over CAD\$100,000 as of December 31 2019? Ye: No

Do you have children? Yes No

	First Name	Date of birth	S.I.N.	Child Qualifies for Disability Credit?		Relationship	
Child 1	_____	_____	_____	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Son	<input type="checkbox"/> Daughter
Child 2	_____	_____	_____	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Son	<input type="checkbox"/> Daughter
Child 3	_____	_____	_____	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Son	<input type="checkbox"/> Daughter
Child 4	_____	_____	_____	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Son	<input type="checkbox"/> Daughter
Child 5	_____	_____	_____	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Son	<input type="checkbox"/> Daughter



