

520 4th Street Coutenay, BC V9N 1H2

Tel: 250-871-0050 Fax: 1-250-871-0051

Email: jay@robbinsandco.ca

2019 PERSONAL INCOME TAX RETURN CHECKLIST

Express Sign-off □

Meeting requested \square

Returning clients, include changes in 2019.			New clients complete all sections.			
Your legal name as it appears with the C	Canada Revenue	e Agency:				
SIN:	Birthdate:					
Address as it appears with the Canada R		<i>'</i> :				
Prefe	Preferred method of co			Marital Status		
Home telephone:			o	^o Single	O Separate	ed
Mobile telephone:			o	O Common-law	O Divorced	d
			o	^o Married	^O Widowe	М
If your marital status changed in 2019, p	olease supply da					
Spouse name:		Spou	se SI	IN:		
spouse name.		0 0 0 0				
·						
Spouse birthdate:				e telephone: SIN Disabilities Y		me Y/N
Spouse birthdate:		Alter		telephone:		
Spouse birthdate: Dependent children: Name Son/E		Alter		telephone:		
Spouse birthdate:	Daughter I	Alter Birthdate	nate	e telephone: SIN Disabilities Y	//N Incor	me Y/N
Spouse birthdate: Dependent children: Name Son/E Are you a Canadian Citizen?	Daughter E	Alter Birthdate	ame	e telephone: SIN Disabilities Y	//N Incor	me Y/N
Spouse birthdate: Dependent children: Name Son/E Are you a Canadian Citizen? Do you authorize Canada Revenue Ager address and date of birth to Elections Ca	Daughter E ncy (CRA) to pro anada for the Na oreign investme	Alter Birthdate vide your n ational Reg	ame	stelephone: SIN Disabilities Y of Electors?	Yes Yes	No E
Spouse birthdate: Dependent children: Name Son/E Are you a Canadian Citizen? Do you authorize Canada Revenue Ager address and date of birth to Elections Ca Did you own foreign property, or hold for	Daughter Ency (CRA) to pro anada for the National investments of C\$100,000?	Alter Birthdate vide your n ational Reg	ame	stelephone: SIN Disabilities Y of Electors?	Yes Yes Yes Yes Yes	No E
Are you a Canadian Citizen? Do you authorize Canada Revenue Ager address and date of birth to Elections Canada you own foreign property, or hold fowith a total cost of all holdings in excess Did you buy or sell a principal residence	Daughter Incy (CRA) to proper anada for the National States of C\$100,000?	Alter Birthdate vide your n ational Reg	ame	stelephone: SIN Disabilities Y of Electors?	Yes Yes Yes Yes Yes Yes Yes Yes	No E No E No E
Spouse birthdate: Dependent children: Name Son/E Are you a Canadian Citizen? Do you authorize Canada Revenue Ager address and date of birth to Elections Ca Did you own foreign property, or hold for with a total cost of all holdings in excess Did you buy or sell a principal residence Did you buy or sell other real estate in 2	Daughter Ency (CRA) to proper anada for the National Section 1997 and 1997	Alter Birthdate vide your n ational Reg	ame	stelephone: SIN Disabilities Y of Electors?	Yes Yes Yes Yes Yes Yes Yes Yes	No E No E No E No E
Are you a Canadian Citizen? Do you authorize Canada Revenue Ager address and date of birth to Elections Canadian property, or hold fowith a total cost of all holdings in excess Did you buy or sell a principal residence Did you buy or sell other real estate in 2 Do you have a Disability Tax Credit certi	Daughter Ency (CRA) to pro anada for the National investments of C\$100,000? in 2019? cfication?	Alter Birthdate vide your n ational Reg	ame, ister iime	stelephone: SIN Disabilities Y of Electors?	Yes Yes Yes Yes Yes Yes Yes Yes	No E No E No E
Spouse birthdate: Dependent children: Name Son/E Are you a Canadian Citizen? Do you authorize Canada Revenue Ager address and date of birth to Elections Ca Did you own foreign property, or hold for with a total cost of all holdings in excess Did you buy or sell a principal residence Did you buy or sell other real estate in 2	Daughter Ency (CRA) to pro anada for the National investments of C\$100,000? in 2019? cfication?	Alter Birthdate vide your n ational Reg ents at any t	ame, ister ime	stelephone: SIN Disabilities Y of Electors?	Yes Yes Yes Yes Yes Yes Yes Yes	No E No E No E No E

Please supply slips or related documents for income and deductions.

If you purchased RRSP's for 2019, please include all slips including slips for the first 60 days of 2020.

We will prepare your 2019 personal income tax return based on the information that you provide to us. We will not audit or otherwise verify the data you submit, although we may ask you for clarification of some of the information. It is our responsibility to prepare your tax return correctly according to the law and the information that you have provided. It is your responsibility to provide us with all the information required to prepare complete and accurate returns.