

# 2019 Income Tax Return Personal Information Sheet

<b>PERSONAL INFORMATION:</b> If you are filing a family income tax return, complete a separate personal information sheet for you and your spouse/common-law partner. If you have children complete the children information session on page 2.						*Social Insurance Number (SIN)						
*Given Name (First Name)						*Surname (Last Name)						
*SMU Student Number A						*Original Entry to Canada (dd-mmm-yyyy)						
*Date of Birth (dd-mmm-yyyy)				*Sex			*Marital Status					
<b>CANADIAN HOME ADDRESS</b>												
Apt/Unit/Room No.			*Street No.			*Street Name						
*City/Town				*Province Nova Scotia			*Country Canada			*Postal Code		
*Phone Number (including area code)						*Email						
Complete this session if you would like Canada Revenue Agency (CRA) to deposit any amounts payable to you (e.g. refund, GST, CCB) directly into your bank account. <b>If you already provided this information to CRA you do not need to do it again.</b>  Name(s) of Account Holder(s): _____  Branch Number _____ Institution Number: _____ Account Number: _____ <span style="margin-left: 100px;">(5 digits)</span> <span style="margin-left: 200px;">(3 digits)</span>												
<b>SELECT THE TAX SLIPS THAT APPLY TO YOU FOR EACH APPLICABLE YEAR</b> (MUST print and bring all the selected tax slips)						<b>DOCUMENTS</b> Read the document section to find out what documents apply to you						
Tax Year	T2202A	T4	T4A	T5	NR4	<ul style="list-style-type: none"> <li><b>T2202A Tuition Certificate</b> – If you attended school (university or college) in any applicable tax year, include your T2202A for each applicable tax year.</li> <li><b>T4 Statement of Remuneration Paid</b> – If you worked in any applicable tax year, included your T4 for each applicable tax year.</li> <li><b>T4A</b> – If you received a T4A certificate from SMU or any employer for any applicable tax year, include the T4A for each applicable tax year.</li> <li><b>T5 Statement of Investment Income</b> – If you received a T5 from a bank or financial institution for any applicable tax year, include your T5 for each applicable tax year.</li> <li><b>NR4 Statement of Amount Paid or Credited to Non-Resident of Canada</b> If you received a NR4 from a financial institution for any applicable tax year, include your NR4 for each applicable tax year.</li> <li><b>2018 Notice of Assessment</b> – If you did your taxes last year, include your 2018 Notice of Assessment from CRA. If you do not have your notice of assessment call 1-800-959-8281 and press 4 and then 0. Tell the CRA agent that you do not have your 2018 notice of assessment and that you need your federal and provincial tuition, education and textbook amounts. If you have a CRA online account, you can get your Notice of Assessment online.</li> <li><b>Study Permit/Work Permit/Visitor Record</b> – If you are filling your income tax return for the first time, include copies of any valid or expired immigration record you have had since you came to Canada.</li> <li><b>Passport</b> – If you are filling your income tax return for the first time, include copy of your current valid passport.</li> </ul>						
<b>2019</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>							
Tax Year	T2202A	T4	T4A	T5	NR4							
<b>2018</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>							
Tax Year	T2202A	T4	T4A	T5	NR4							
<b>2017</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>							
Tax Year	T2202A	T4	T4A	T5	NR4							
<b>2016</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>							
Tax Year	T2202A	T4	T4A	T5	NR4							
<b>2015</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>							
Tax Year	T2202A	T4	T4A	T5	NR4							
<b>2014</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>							
Tax Year	T2202A	T4	T4A	T5	NR4							
<b>2013</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>							
<b>ADDITIONAL INFORMATION</b>												
Did you work in a coop/internship/summer job in any applicable tax year? If yes, did you have to move at least <b>40kms</b> from Halifax to do this job? If yes when (start and end dates) and where (city/province)? When? _____ Where? _____												
Did you buy the student Upass in any applicable tax year? If yes, how much did you pay for the Upass each applicable tax year?												
2017 (January to June ONLY) \$			2016 \$		2015 \$		2014 \$		2013 \$		2012 \$	
Did you buy any other public transit bus pass in any applicable tax year? If yes, how much did you pay for the bus pass each applicable tax year?												
2017 (January to June ONLY) \$			2016 \$		2015 \$		2014 \$		2013 \$		2012 \$	
Did you have SMU health/medical insurance plan coverage in any applicable tax year? If yes, how much did you pay for the SMU health plan each applicable tax year?												
2019 \$		2018 \$		2017 \$		2016 \$		2015 \$		2014 \$		2013 \$
Did you have another health/medical insurance plan coverage in any applicable tax year? If yes, how much did you pay for that health plan each applicable tax year?												
2019 \$		2018 \$		2017 \$		2016 \$		2015 \$		2014 \$		2013 \$

Did you pay for any health/medical/prescribed medication/dental work expenses not covered by your health/medical insurance in any applicable tax year? If yes, how much did you pay each applicable tax year?						
2019 \$	2018 \$	2017 \$	2016 \$	2015 \$	2014 \$	2013 \$
Did you make any donations to a charitable organization (e.g. church, NGO, etc) in any applicable tax year? If yes, how much did you donate each applicable tax year? Include your donation receipt for each year.						
2019 \$	2018 \$	2017 \$	2016 \$	2015 \$	2014 \$	2013 \$
Did you buy registered retirement savings plan (RRSP) in any applicable tax year? If yes, how much RRSP did you buy for each applicable tax year? Include your RRSP receipt for each year.						
2019 \$	2018 \$	2017 \$	2016 \$	2015 \$	2014 \$	2013 \$
<b>CHILDREN INFORMATION</b> (Complete this section if you have children under 18 years old and they live with you in Canada)						
<b>CHILD ONE – PERSONAL INFORMATION</b>						
*Given Name (First Name)			*Surname (Last Name)			
*Date of Birth (dd-mmm-yyyy)	*Sex	*City and country of Birth			* Original Entry to Canada (dd-mmm-yyyy)	
<b>CHILD TWO – PERSONAL INFORMATION</b>						
*Given Name (First Name)			*Surname (Last Name)			
*Date of Birth (dd-mmm-yyyy)	*Sex	*City and country of Birth			* Original Entry to Canada (dd-mmm-yyyy)	
<b>CHILD THREE – PERSONAL INFORMATION</b>						
*Given Name (First Name)			*Surname (Last Name)			
*Date of Birth (dd-mmm-yyyy)	*Sex	*City and country of Birth			* Original Entry to Canada (dd-mmm-yyyy)	
<b>CHILDREN DOCUMENTS</b> <i>Read this document section to find out what children documents to include in your income tax return</i>						
<ul style="list-style-type: none"> <li>• <b>Passport/Birth Certificate</b> – Bring passport/certificate so that I can make copies.</li> <li>• <b>Immigration Document</b> – Bring document so that I can make copies.</li> <li>• <b>Receipt from Daycare</b> – If your child was enrolled in daycare in any applicable tax year, include an official receipt from the daycare showing the amount paid and the length of the daycare service. Daycare includes any day camp.</li> <li>• <b>Receipt from Babysitter</b> – If you paid someone to look after your child who was 16 years old or younger, in any applicable tax year, so that you or your spouse/common-law partner could go to work or school, include a receipt from that person showing the amount paid and the length of babysitting service.</li> <li>• <b>Receipt from Camp Programs</b> – Any overnight camps (child must be 16 years old or younger).</li> </ul>						
<b>CANADA CHILD BENEFIT (CCB)</b> <b>IF YOU ALREADY APPLIED FOR THE CCB, AND ARE RECEIVING THE CCB BENEFITS, YOU DO NOT NEED TO APPLY AGAIN</b>						
<p>The Canada Child Benefit (CCB) is a tax-free monthly payment made to eligible families to help them with the cost of raising children under 18 years of age. For the 2019 tax year, depending on your adjusted family income, you could get up to a maximum of \$6,639 (\$533.25 monthly) for each child under 6 years of age and \$5,602 (\$466.83 monthly) for each child 6 to 17 years of age. In addition, you may also qualify for the NS Affordable Living Tax Credit and the Nova Scotia Child Benefit.</p> <p><b>NOTE:</b> To qualify for the CCB international students must be living in Canada for at least 19 consecutive months and have a valid study permit or work permit. This 19-month requirement applies regardless of whether your child was born in Canada.</p>						
<b>IF YOU ARE APPLYING FOR THE CANADA CHILD BENEFIT (CCB) YOU ALSO NEED TO INCLUDE THE FOLLOWING DOCUMENTS</b>						
<ul style="list-style-type: none"> <li>• <b>Letter from Daycare or School</b> – If your child is going to daycare or school, you need a letter showing your child's name, your child's home address and your child's contact information, and confirming that your child is enrolled in the daycare or school and stating the date the child started daycare or school.</li> <li>• <b>Letter from Your family Doctor</b> – This letter must be signed by your doctor attesting that he/she is your family doctor and when he became your doctor.</li> <li>• <b>House/Apartment Lease/Contract</b> – Include a copy of your apartment/house lease. Copy all the pages. If you own a house or car include copies of ownership</li> <li>• <b>MSI Card</b> – If you, your spouse/common-law or child have MSI coverage, include copies of the MSI cards.</li> <li>• <b>Nova Scotia ID Card</b> – If you or your spouse/common-law have a NS ID card, include copies of the cards.</li> <li>• <b>NS driver's License</b> – If you or your spouse/common-law have NS driver's licenses, include copies of the licenses.</li> <li>• <b>Utility Bills</b> – Copies of your utility bills.</li> <li>• <b>Rent Receipts</b> – Copies of your rent receipts.</li> <li>• <b>Canadian Bank Account</b> – If you and your spouse/common-law have bank accounts, include a letter from the bank confirming you have accounts and stating the date when you opened the account. In addition, you also need copies of your bank monthly statements for the last 18 months.</li> <li>• <b>Marriage Certificate</b> – Include copy of your marriage certificate (must be in English or French).</li> </ul>						
<b>NOTE:</b> If you are filing a family income tax return, and both spouses (common-law) lived in Canada in any applicable tax year, both spouses (common-law) must file their own income tax returns for that applicable tax year.						
<b>NOTE:</b> If you are separated or divorced you can file your income tax return regardless of whether your ex-spouse/partner files an income tax return.						