

## 2017 Personal Income Tax Checklist

Personal Information					
First Name		Last Name			
Street Address		City			
Province		Postal Code			
Home Phone Number		Cell. Number			
Date of Birth		S.I.N.			
Marital Status: <input type="radio"/> Single <input type="radio"/> Married <input type="radio"/> Common Law <input type="radio"/> Separated <input type="radio"/> Divorced <input type="radio"/> Widowed					
Changes in Family Situation/Dates (Birth, Marital Status, Death)					
Are we preparing your spouse's return? <input type="radio"/> Yes <input type="radio"/> No (if No, please provide Net Income): \$					
Spouse's Last Name:			Spouse's First Name:		
Date of Birth:			S.I.N.:		
Information about Dependents (children or senior parent living with taxpayer)					
First Name	Last Name	Relationship	Date of Birth	S.I.N.	Income
Other Information					
Are you a Canadian Citizen? <input type="radio"/> Yes <input type="radio"/> No		Are you a U. S. Citizen? <input type="radio"/> Yes <input type="radio"/> No			
Do you authorize the Canada Revenue Agency to give your name, address and date of birth to Elections Canada so that your name appears on the voting lists?				<input type="radio"/> Yes <input type="radio"/> No	
Did you, at any time in 2017, own or hold foreign property where the total cost of all such property, was more than CAN \$100,000? If so, a T1135 will need to be completed				<input type="radio"/> Yes <input type="radio"/> No	
Did you dispose of a principal residence in 2017?				<input type="radio"/> Yes <input type="radio"/> No	
Did you purchase your first home in 2017?				<input type="radio"/> Yes <input type="radio"/> No	
Delivery and Logistical Considerations					
In our continued commitment to reduce our environmental footprint, we would like to offer you the opportunity to obtain your client copy of your 2017 personal tax returns in a digital format. Would you agree to us sending you a PDF copy of your return by way of a secured email?				<input type="radio"/> Yes <input type="radio"/> No	
If Yes, please provide preferred email address:					
If No, do you still require a paper version?				<input type="radio"/> Yes <input type="radio"/> No	
Do you want your original slips/documents returned?				<input type="radio"/> Yes <input type="radio"/> No	

PLEASE CHECK THE ITEMS THAT APPLY TO YOU AND PROVIDE APPROPRIATE SLIPS AND BACK-UP	
<b>Personal Income</b>	<b>Investment Income</b>
<input type="radio"/> T4/RL-1 Salaries and Employment Income	<input type="radio"/> T3/RL-16 Statements of Trust Income
<input type="radio"/> T4A(P)/RL-2 Canada and Quebec Pension Plan Benefits	<input type="radio"/> T3/RL-16 Statements of Trust Income (Mutual Fund Income)
<input type="radio"/> Other Employment Income	<input type="radio"/> T5/RL-3 Statements of Investment (Interest, Dividend Income)
<input type="radio"/> T4A (OAS) Old Age Security Benefits	<input type="radio"/> T600/T600B Canada Savings Bond Interest
<input type="radio"/> T4A/RL-1/RL-2 Other Pension or Superannuation	<input type="radio"/> Interest on Tax Refunds
<input type="radio"/> T4RSP/RL-2 RRSP Income	<input type="radio"/> T5008/RL-18 Statement of Security Transactions
<input type="radio"/> T4RIF/RL-2 RRIF income	<input type="radio"/> Foreign Income not on Canadian slips (1042S, 1099)
<input type="radio"/> T4E/RL-6 Employment Insurance Benefits	<input type="radio"/> Rental Income (please provide full details)
<input type="radio"/> T5007/RL-5 WCB Benefits and Social Services Benefits	<input type="radio"/> T5013/RL-15 Statement of Partnership Income
<input type="radio"/> Home Buyers Plan (HBP) amounts	<input type="radio"/> Capital Gains/Losses (please provide full details)
<input type="radio"/> T4-RCA/RL-1 Distributions from an RCA	<input type="radio"/> Annuities
<b>Other</b>	<b>Business</b>
<input type="radio"/> Alimony and spousal support received	<input type="radio"/> Self-employment income (please provide details)
<input type="radio"/> Taxable child support received	<input type="radio"/> Business Income (please provide details)
<input type="radio"/> Scholarships/bonuses	<input type="radio"/> Professional Income (please provide details)
<input type="radio"/> RC62 Statement of Universal Child Care Benefit	<input type="radio"/> Self-employed commission income
<input type="radio"/> Other (please provide details)	<input type="radio"/> Farming and Fishing Income (please provide details)
<b>Credits</b>	<b>Deductions and Other Items</b>
<input type="radio"/> Spousal Amount- Spouse's net income	<input type="radio"/> RRSP contributions
<input type="radio"/> Disability deductions	<input type="radio"/> Annual union, professional or like dues
<input type="radio"/> T2202A Tuition Amount Certificate	<input type="radio"/> Child Care expenses (please provide receipts)
<input type="radio"/> Education credits from dependents	<input type="radio"/> Moving Expenses (please provide details)
<input type="radio"/> Medical Receipts	<input type="radio"/> Alimony Paid
<input type="radio"/> Charitable donation receipts	<input type="radio"/> Interest paid to earn investment income
<input type="radio"/> Attendant care expenses	<input type="radio"/> Carrying charges to earn investment income
<input type="radio"/> Monthly transit amounts (to June 30, 2017)	<input type="radio"/> Investment counsel and accounting fees paid
<input type="radio"/> Home Accessibility Expenses	<input type="radio"/> Interest on student loan
<input type="radio"/> Relevé 31 Information on the occupancy of a dwelling	<input type="radio"/> Relevé 30 Subsidized educational childcare
<input type="radio"/> Children's Fitness or Art Activity receipts	<input type="radio"/> Details of foreign property holdings
<input type="radio"/> Senior's (age 70 or older) activity receipts	<input type="radio"/> Prior year's notice of assessments
<input type="radio"/> Political Contribution receipts	<input type="radio"/> Instalments made in the year
<input type="radio"/> Expenditures for eco-friendly renovation work or expenditures related to the upgrading of residential waste water treatment incurred in the year or (please provide receipts)	<input type="radio"/> If this is the first year we are filing your return, please provide us with a copy of your previous year's return