



2017 PERSONAL INCOME TAX RETURN CHECKLIST

(For each item that applies, please provide applicable supporting documentation)

Information slips:

- | | | | |
|--|--------|--|--------|
| <input type="checkbox"/> Employment income | T4 | <input type="checkbox"/> Interest and Dividend Income | T5 |
| <input type="checkbox"/> Pension, Retirement, Annuity & Other Inc. | T4A | <input type="checkbox"/> Trust, Estate or Mutual Fund Income | T3 |
| <input type="checkbox"/> Canada Pension Plan benefits | T4AP | <input type="checkbox"/> Workers' Compensation benefits | T5007 |
| <input type="checkbox"/> Old Age Security benefits | T4AOAS | <input type="checkbox"/> Partnership income | T5013 |
| <input type="checkbox"/> Employment insurance benefits | T4E | <input type="checkbox"/> Securities transactions | T5008 |
| <input type="checkbox"/> RRIF Income | T4RIF | <input type="checkbox"/> Tuition and Enrolment Certificate | T2202A |
| <input type="checkbox"/> RRSP Income | T4RSP | <input type="checkbox"/> Other: _____ | |

Other income:

- | | |
|--|---|
| <input type="checkbox"/> Other Employment income or Taxable Benefits | <input type="checkbox"/> Pensions (other than reported on T slip) |
| <input type="checkbox"/> Business or Professional Income & Expenses | <input type="checkbox"/> Interest earned but not received (bonds, term deposits, T-Bills, mutual funds) |
| <input type="checkbox"/> Partnership Income | <input type="checkbox"/> Capital Gains and Losses |
| <input type="checkbox"/> Rental Income & Expenses | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Alimony and/or Child Support income | |

Other expenses:

- | | |
|--|---|
| <input type="checkbox"/> RRSP Contributions (include receipts up to March 1, 2018) | <input type="checkbox"/> Public Transit Passes to June 30, 2017 |
| <input type="checkbox"/> Professional and/or union dues | <input type="checkbox"/> Adoption expenses |
| <input type="checkbox"/> Child care expenses | <input type="checkbox"/> Interest paid on Canada Student Loans |
| <input type="checkbox"/> Moving expenses (if moved >40 km for work) | <input type="checkbox"/> Medical/Dental expenses including insurance premiums |
| <input type="checkbox"/> Alimony and/or Child Support payments | <input type="checkbox"/> Charitable donations &/or Political Contributions |
| <input type="checkbox"/> Interest on money borrowed to earn investment income | <input type="checkbox"/> Costs related to Home Accessibility of a Disabled Person |
| <input type="checkbox"/> Investment counsel/management fees (unregistered plans) | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Employment expenses (please provide signed T2200) | <input type="checkbox"/> Other: _____ |

Information received from Canada Revenue Agency:

- Receipts for or Summary of 2017 income tax instalments or payments of tax
- 2016 Assessment Notice and any other CRA correspondence

Other information:

- Please inform us of any changes in your personal information – address, phone number, marital status, dependants, etc.
- Please ensure that we have the names, dates of birth, and social insurance numbers of all children under age 18.
- If one of your dependants was in full-time attendance at a university or college, please provide details concerning dependant's net income and tuition information (ie. Form T2202A).
- Details of any capital gains and losses realized in 2017 including annual investment summary from broker.
- Please inform us if you have **sold any property** including your principal residence, a rental or vacation property during 2017.
- Details regarding RRSP - Home Buyers' Plan or Lifelong Learning Plan withdrawals.
- Details of **foreign property** owned at any time in 2017 including cash, stocks, trusts, partnerships, real estate, tangible and intangible property, contingent interests, convertible property, etc. Please provide details of income amount by country.
- Details of income from, or distributions to, foreign entities such as foreign affiliates and trusts.
- If you purchased a home and did not own a home in the preceding four years, you may be eligible for the new first-time home buyer's credit. Please provide us with information to verify your home purchase.
- Please inform us if you are a volunteer firefighter or a search and rescue volunteer.
- If you are disabled or any of your dependants are disabled, please provide Form T2201 - disability tax credit certificate.
- If you provided in-home care for a parent or grandparent (including in-laws) 65 years of age or over who is dependant on you because of a mental or physical infirmity, or an infirm dependant relative, please provide details of relative including, name, relationship to you, Social Insurance Number and net income.