

PERSONAL INCOME TAX CHECKLIST – 2017

To prepare your tax return, we will need the following information and documents as they apply to you:

INCOME

DOCUMENTS

- Salaries, wages, commissions, fees, allowances T4, T4A
- Pensions T4A, T4AP, T4A(OAS), T4(RIF), T4A (RCA)
- Social Assistance/WSIB T5007
- EI Benefits T4E
- Investments – Interest, Dividends, Foreign Income T5, T4PS, T600, T3, T5008, T5013
- Capital Gains and Losses Buy/Sell slips, T3, T4PS, T5, Broker Summaries
- Rental Income Income and expenses
- Alimony, child support or separation allowances Amount
- Registered Retirement Savings Plan Income T4RSP
- Other Income (retiring allowances, scholarships etc.) T4A, Listing of Income
- Income and Expenses from Self Employment Listing, receipts or financial statements
- Universal Child Care Benefit RC62

DEDUCTIONS and CREDITS

- Allowable employment expenses (auto, travel etc.) T2200 from employer, receipts
- R.R.S.P. contributions Official receipts
- Use of Home Buyers' Plan Revenue Canada statement
- Union or professional dues Official receipts
- Tuition fees T2202A or TL11

- Were you or a dependent disabled during the year? (impairment must have lasted or be expected to last for more than one year). Complete Form T2201 and provide caregiver receipts.
- If you began to pay child or spousal support or renegotiated your child or spousal support payments in the tax year, please provide a copy of the agreement.
- Did any of your children begin college or university in the tax year? If they did not live at home or in residence, please provide a receipt detailing landlord, address and amount.

OTHER

- Did you move? Please provide address and telephone number.
- If you purchased your first home in 2017, provide your Statement of Adjustments so that you may apply for the First Time Home Buyer's Credit.
- Your E mail address and current contact information.
- Notice of Assessment and for new clients, last year's Income Tax Return.
- Do you want Direct Deposit? If yes provide void cheque.
- Do you want to authorize the Canada Revenue Agency to provide Elections Canada with your name, address and birth date to allow Elections Canada to update the National Register of Elections?
- Do you own or did you hold Foreign Property at any time in the tax year with a total value of more than \$100,000 Canadian?
- Did you sell any real estate including your principal residence during the tax year? We will require all details of the transaction including legal documents from the purchase and sale.