

## 2017 Personal Income Tax Return Checklist

PERSONAL INFORMATION							
Name		SIN	DOB (yyyy/mm/dd)	Home Phone		Cell Phone	
Current Address					Postal Code		
Email							
Marital Status	<input type="checkbox"/> Married	<input type="checkbox"/> Single	<input type="checkbox"/> Common Law	<input type="checkbox"/> Separated	<input type="checkbox"/> Divorced	<input type="checkbox"/> Widowed	
If Marital Status changed during the year, provide date			File US tax		Yes - No		
Are you Canadian resident			Yes - No		Sold Principal residence last year? Yes or No (provide details if yes)		Entry into Canada (YYYY/MM/DD)
Foreign assets with aggregate cost greater than \$100,000?				Yes - No		Complete T1135	Yes - No
Dependents							
Name:			DOB:		Relationship:		
Name:			DOB:		Relationship:		
Name:			DOB:		Relationship:		
Did you receive UCCB (RC62)?			Yes - No		Require to pay back Home Buyers Plan or LLP?		Yes - No \$
Income and Expense details – make sure you count all the slips to avoid any penalties* and interest* imposed by CRA. Each person use a copy of this checklist.							
Income Slips	No. of slips	Income Slips	No. of slips	Deductions/Credits		Deductions/Credits	
				D/C	No. of slips	D/C	No. of slips
T4		Support Payment		Accounting Fees		Medical expense (if more than 3% of your net income)	
T3		Home buyer/LLP		Search and rescue volunteers amount		Moving Expense	
T5		Foreign Income		Alimony paid		Pension amount	
T4A		US Social Security		Adoption expenses		RRSP contribution (from Mar 2 to Mar 1 of this year)	
T4AP CPP		Stocks & Bonds <sup>C</sup>		Childcare expense		Student Loan	
T4A-OAS		Buy & Sell real-estate		Canada Caregiver		Tuition fee (form T2202)	
T4RSP		Rental income <sup>B</sup>		Capital loss carried forward amount		Transit passes (Jan 1 to Jun 30)	
T4E		Self-employed <sup>A</sup>		Disability T2201 <small>provide CRA letter copy</small>		Union Dues	
T4-RIF		Commission income <sup>A</sup>		Donations		Tax paid in installment	
RC62		Farming income <sup>A</sup>		Disability support deduction		Last year NOA	
T5007		Fishing income <sup>A</sup>		Employment expenses T2200 <small>Provide form copy</small>		1. Other deductions	
T5018		1. Other income		First time home buyer		2.	
T5013		2.		Interest on investment		3.	
T5008		3.		Legal Fees		4.	
T4 PS		4.		Home accessibility expenses		5.	

A & B – Please use self-employment and rental income checklist on the website C – provide capital gain realization report.

\* See disclaimer