

2017 PERSONAL INCOME TAX RETURN CHECKLIST

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Personal Information	
	Current mailing address, phone number, and other contact information
	Details of any change in marital / relationship status (i.e. common-law, married, separated, divorced)
Principal Residence	
	If you disposed of your principal residence during the year, please provide the following information: Description of property; Acquisition date; Disposition date; Sale proceeds; Cost; Selling expenses
Dependents	
	Names and birth dates of children born in 2017 and SINs of all children, if applicable
	RC62 - Universal Child Care Benefits
General Income	
	T4 - Employment income
	T4E - Employment insurance
	T5007 - Workers' Compensation Benefits / Social Assistance payments
	If you are a commissioned sales person – include detailed expenses related to earning income
Deductions	
	RRSP receipts for 2017 – including first 60 days of 2018
	T2200 - Declaration of employment and allowable employment expenses
	Union & professional dues receipts
	Child care expenses and/or attendant care expenses
	Spousal alimony support payments received or paid – including spouse's name and SIN
	Any legal expenses to collect alimony, pension, or retiring allowances
	Moving expenses if you moved 40+ km to a new job or work location
	T101, T102, T5103 - Statement of exploration & development expenses
Pension Income	
	T4A - Pension, retirement, annuity, old age security, or other income
	T4AP - Canada Pension Plan benefits
	T4OAS - Old Age Security pension
	T4RIF - Income from a registered retirement income fund
	T4RSP - Income from registered retirement savings plans
	Foreign pension income – UK or other
Investment Income & Deductions	
	T3 - Interest, dividends, capital gains, mutual funds
	T4PS - Statement of employee profit-sharing plan allocations & payments
	T5 - Investment and dividend income
	T5013 - Statement of partnership income
	T5008 - Statement of securities transactions
	Annual trading summary; realized gain / loss on investments summary (usually obtainable from broker)
	Interest paid on loans for investment purposes
	Other carrying charges or investment management fees paid on non-registered investment accounts
	Information on any business investment losses
	Other capital property dispositions – i.e. sale of rental property, etc.

Self-employment / Business / Professional / Rental Income & Deductions	
	Details of self-employed income and expenses for the calendar year
	Home office expenses – i.e. square footage usage, utilities, insurance, strata fees, mortgage interest, property taxes & rent, if applicable
	Details of real estate rental income and expenses for the calendar year

Other Credits	
	Tuition slips (T2202A) and receipts <ul style="list-style-type: none"> - <u>Note</u>: Education and textbook credit no longer apply – tuition only - <u>Note for 2017</u>: Fees paid for Occupational Skill courses that are not at the post-secondary level may be eligible for this credit
	Statement of interest paid on student loans
	Medical & dental receipts – including amounts paid to a private health services plan <ul style="list-style-type: none"> - ONLY non-reimbursed amounts
	Charitable and political donations receipts
	Monthly or annual public transit receipts (applicable for January 1, 2017 to June 30, 2017 only)
	Home renovation expenses that improve accessibility for individuals age 65 and over

Prior Year Tax Return – Information & Correspondence	
	Copy of your 2016 Notice of Assessment and/or any Reassessments
	Copy of your last tax return if you are a new client
	Personal income tax instalments paid for 2017

Additional Notes:

