

2017 Personal Tax Return Checklist

Name		Spouse's Name (if applicable)	
S.I.N.		Spouse's S.I.N.	
Date of Birth (DD-MM-YYYY)		Spouse's Date of Birth (DD-MM-YYYY)	
Marital Status		Email Address	
Address			
Phone Number		Citizenship if not Canadian	
Dependent's Name			
Dependent's S.I.N.			
Dependent's D. of B.			

Please check only those questions that apply to you, and then assemble the information noted in the right hand column.

Questions	YES	NO	Information Required (if YES)
Do you wish your name, address and date of birth to be provided to Elections Canada?	<input type="radio"/>	<input type="radio"/>	
Did you own a foreign property at any time in 2017 with a total cost of more than CAN\$100,000?	<input type="radio"/>	<input type="radio"/>	Please contact our office.
Have you sold a principal residence in 2017? Penalties apply is not reported!	<input type="radio"/>	<input type="radio"/>	Provide details
New to Canada/Departed Canada?	<input type="radio"/>	<input type="radio"/>	Date of Entry/Date of Departure
Previous Year's Notice of Assessment(s)	<input type="radio"/>	<input type="radio"/>	All assessments and reassessments
Are you a new client?	<input type="radio"/>	<input type="radio"/>	Previous Year's tax return
Employment Income, Employment Insurance Income?	<input type="radio"/>	<input type="radio"/>	T4s and T4As, T4E
CPP or OAS Income?	<input type="radio"/>	<input type="radio"/>	T4A (P) and T4A (OAS)
Investment Income?	<input type="radio"/>	<input type="radio"/>	T3, T5 or T5013
Universal Childcare Benefit for children? (Note: Ended after June 2016)	<input type="radio"/>	<input type="radio"/>	RC62
RRSP or RRIF Income? Homebuyer Plan withdrawals?	<input type="radio"/>	<input type="radio"/>	T4RSP and T4RIF
Did you receive or pay any spousal support?	<input type="radio"/>	<input type="radio"/>	Details of all amounts of both child and spousal support paid and received.
Did you receive WSIB or social assistance payments?	<input type="radio"/>	<input type="radio"/>	T5007
Did you receive any income, Canadian or foreign for which you did not received an information slip?	<input type="radio"/>	<input type="radio"/>	Please provide details
RRSP Contributions?	<input type="radio"/>	<input type="radio"/>	RRSP Receipts
Did you sell any unregistered securities?	<input type="radio"/>	<input type="radio"/>	Statement of Gains and Losses (usually provided by investment firm)

Did you borrow money to invest?	<input type="radio"/>	<input type="radio"/>	Statement of interest paid
Did you pay accounting or investment counsel fees?	<input type="radio"/>	<input type="radio"/>	Statement of fees paid
Did you pay fees for collection support or wage loss?	<input type="radio"/>	<input type="radio"/>	Provide details
Did you pay professional or union dues?	<input type="radio"/>	<input type="radio"/>	Provide details/receipts
Did you pay child care expenses?	<input type="radio"/>	<input type="radio"/>	Specify name, address and SIN of recipient unless a business. Provide amounts paid.
If you are a teacher, did you incur expenses for eligible teaching supplies? Up to \$1,000 qualifies.	<input type="radio"/>	<input type="radio"/>	Provide details/receipts
Are you a volunteer firefighter or search and rescue volunteer?	<input type="radio"/>	<input type="radio"/>	
Are you or any dependent disabled?	<input type="radio"/>	<input type="radio"/>	Provide details
Did you spend \$100 or more on tuition? Did your child or spouse have unused tuition and education amounts?	<input type="radio"/>	<input type="radio"/>	T2202A and details of child or spouse amounts if we are not filing their return.
Student Loan interest?	<input type="radio"/>	<input type="radio"/>	Provide statement
Medical expenses or attendant care expenses?	<input type="radio"/>	<input type="radio"/>	Provide details and all receipts (or a report from the insurer or pharmacy)
Are you over 65 and completed renovations to make your home safer or more accessible? (Up to \$10,000 qualifies)	<input type="radio"/>	<input type="radio"/>	Provide receipts
Does a member of your family require support due to a mental or physical infirmity?	<input type="radio"/>	<input type="radio"/>	Provide details
Charitable or Political donations in 2017?	<input type="radio"/>	<input type="radio"/>	Provide receipts
Monthly transit passes or Presto card?	<input type="radio"/>	<input type="radio"/>	Provide receipts or statements Costs from January 1 to June 30 only
Property tax or rent paid?	<input type="radio"/>	<input type="radio"/>	Provide amount paid and address(es) and landlord (if applicable) and number of months
Were any income tax instalments paid?	<input type="radio"/>	<input type="radio"/>	Provide statement
Did you move at least 40km closer to your new employer? If student, did you move to attend school?	<input type="radio"/>	<input type="radio"/>	Details of moving costs
Did you rent any property?	<input type="radio"/>	<input type="radio"/>	Details of rental income and expenses
Did you incur employment expenses?	<input type="radio"/>	<input type="radio"/>	T2200 and details of expenses
Where you self-employed as a proprietor?	<input type="radio"/>	<input type="radio"/>	Details of income and expenses? HST returns to be filed, if applicable
Are you a first-time homebuyer?	<input type="radio"/>	<input type="radio"/>	Details of purchase

Any other information: