

2017 Personal Income Tax Return Checklist

Income

- T4 slips (Employment income)
- Employment insurance benefits (T4E)
- Interest, dividends, mutual funds (T3, T5, T5008)
- Tuition / education receipts (T2202A)
- Universal Child Care Benefit (RC62)
- Old Age Security and CPP benefits (T4A-OAS, T4AP)
- Other pensions and annuities (T4A)
- Social assistance payments (T5007)
- Workers' compensation benefits (T5007)
- T5018(Subcontractors)
- Any other and all T-Slips

There are significant penalties for not reporting income. Make sure you have all your income slips.

Deductions

- RRSP contribution receipts
- Support for a child, spouse or common-law partner
- Professional or union dues
- Tool expenses (Tradespersons & apprentice mechanics)
- Medical expenses n Transit pass receipts
- Charitable donations
- Political contributions
- Child care expenses
- Moving expenses
- Interest paid on student loans
- Carrying charges and interest expenses
- Professional and union dues

Correspondence

- Assessment/Reassessment n Canada Revenue Agency
- Details of Home sale
- Disability tax credit approval
- Custody Arrangement documentation
- Income tax instalments paid in 2017 and Instalment Reminders
- 2016 Tax assessment/reassessments
- Volunteer Firefighters certification
- Search and Rescue volunteers certification

Other information

1. Details of capital gains and losses realized in 2017. This may be obtained, in some circumstances, by contacting your investment advisor
2. Details on the disposition of your principal residence or other real property. If disposing of your principal residence, please provide: proceeds of disposition, address of the property, and the year the property was acquired

Personal Data

- Name, address, date of birth, SIN., and province of residence on December 31, 2017 if changed in the current year.
- Personal status – single, married, common-law, separated, divorced, widowed. If married or common-law, provide the spouse/partner's income, SIN., and birth date
- List of dependants/children – including their incomes and birth dates

Business Income

- Income and Expenses incurred in a Business as a Self employed individual or in a partnership, Farmers and Fisherman
- Rental income and expense receipts
- HST Filings for self-employed - where applicable

Ensure that all expenses recorded were incurred for business purposes and designed to create further revenue for the business

FOREIGN PROPERTY

Did you own or hold foreign property at any time in 2017 with a total cost of more than CAD \$100,000?

Yes _____ No _____

