

# TAX SEASON CHECKLIST

**Please provide the names, addresses, dates of birth, SIN numbers and phone numbers for everyone we will be preparing a return for on a separate page and include with your slips to us.**

## **BACKGROUND INFORMATION ON YOU:**

- Did you change your address in 2017? If so, have you notified CRA?
- New Rules:** Did you sell your principal residence in 2017? If so, please provide us with the details. **CRA will charge penalties if you do not report the sale on your tax return.**
- Instalments you made for 2017 taxes
- All correspondence from CRA during the year (we do not receive copies from CRA)
- Are you a citizen or have a green card of another country? (i.e. the U.S.)
- How many days were you present in the U.S. during 2017 for any reason?
- Other items (Home owners and Life Long Learning, RRSP withdrawal, moving in or out of Canada, foreign assets)

## **INCOME:**

- T4's (employment income), T4A (Pensions and contract work), T5013 (partnership income)
- Other income (CPP, Old Age Security, disability benefits, Universal Child Benefit, EI benefits)
- T3's, T5's (investment slips)
- All other incomes (child support, student scholarships and bursaries, U.S. income, death benefits, WCB, RRSP, etc.)
- Lump sum income in 2016 such as: retirement allowances, pension or wrongful dismissal settlements, RRIF payout
- Foreign Income Verification Statement – Did you have foreign assets with a combined total **COST** of more than \$100,000 Canadian? This includes foreign property (real estate), investments, shares/stocks/bonds, trusts, etc. If so, did you provide us with all investment details?

## **SELF EMPLOYED BUSINESS INCOME & EXPENSES: (Proprietorship)**

- Visit our website – see PDF in Tax Season Information page

## **RENTAL INCOME:**

- Visit our website – see PDF in Tax Season Information page

## **CAPITAL GAINS & LOSSES: (and other investment income & expenses)**

- Visit our website – see PDF in Tax Season Information page. Please provide, if possible, an annual gain/loss statement from your broker

## **DEDUCTIBLE EXPENSES: ALL OF THESE REQUIRE RECEIPTS**

- RRSP contributions
- Deduction for elected pension splitting (we will review it with you)
- Annual union or professional dues
- Tradesperson tool deduction
- Are you on a qualified apprenticeship training program?
- Childcare expenses
- Disability support deduction
- Allowable Business Investment Loss (ABIL)
- Moving expenses – 40 kilometers closer to work
- Spousal support payments – we need the court agreement and proof of payment
- Tax shelter slips

## **EMPLOYEE AND COMMISSION SALESPERSON EXPENSES:**

- T2200 tax form signed by your employer and dollar amount reimbursed by employer. Visit our website for the form
- Meals and entertainment, automobile, home office expenses and other supplies not provided by your employer

## **TAX CREDITS: ALL OF THESE REQUIRE RECEIPTS OR FORMS**

- Names, birth dates & SIN's of **ALL** dependant children living with you in 2017
- Disability claims, child disability claims and family caregiver
- Volunteer Firefighter's Amount/Search and Rescue Volunteer Amount
- Public transit pass credit – we need passes and receipts
- Children's Fitness Amount
- Children's Arts Amount
- Teacher and Early Childhood Educator School Supply Tax Credit
- Adoption expenses
- Tuition or excess/unused tuition from dependents - includes domestic and foreign universities

Please include the **FULL** tax return for the dependant

- Bursary/Scholarship deduction – shown on form T4A, interest on student loans – a receipt issued from the bank
- Medical expenses less insurance reimbursements (**Please total these up or we charge for calculating totals**). For a list of eligible expenses go to [www.cra-arc.gc.ca/medical/](http://www.cra-arc.gc.ca/medical/)
- Charitable and/or political donations

**PLEASE PROVIDE ALL SLIPS AND RECEIPTS**