

2016 Personal Tax Checklist

Please do not send sensitive information via email. I can provide free secure email access via e-courier – please ask if you are not already set up.

GENERAL ITEMS

- A copy of last year's return, including spouse's return (if you are new to me)
- Contact details if changed
- 2015 Notice of Assessment
- Changes to your personal status - marriage, separation, divorce or widowed, births and deaths
- Names of spouse & dependents
- Personal tax Installments
- Details of foreign property holdings (if any*) including cost of property held *
- Contact details of financial planner & financial institution(s)
- Details of lawsuits settled in 2016

INCOME

- Universal child care benefit (RC62)
- Employment income (T4)
- Pension income (T4A, T4A(P), T4RIF, T4RSP)
- Old age security (T4OAS)
- Investment income (T5)
- Income from trusts such as mutual fund investments (T3) (These slips may arrive as late as April)
- Income from employment insurance (T4E)
- Income from partnerships (T5013)
- Workers compensation/social assistance payments (T5007)
- Details of the sale of securities such as stocks and bonds (eg. trading summary from your broker) *
- Details of principal residence if sold in 2016 – New for 2017!**
- Income from foreign investments *
- Spousal support payments received

DEDUCTIONS – GENERAL

- RRSP contributions
- Medical, dental, prescription drugs, nursing home expenses – please summarize by recipient and practitioner
- Payments to a private health insurance plan
- Charitable donations
- Tuition fees/education amount (T2202A) for yourself or transferred from a dependent such as a child or grandchild
- Interest paid on student loans
- Professional dues, union dues
- Public transit passes
- Children's participation in programs related to physical activity and arts
- Interest on loans to purchase investments
- Professional consultant fees
- Legal fees paid to establish child or spousal support or to enforce a pre-existing agreement
- Legal fees paid to recover wages from your employer
- Details of people you support and their medical status
- Child care receipts (for camp, list dates attended)
- Moving expenses if you moved 40km or closer to work or school *
- Renovation costs incurred by those 65 and older in 2016 maximum \$10,000
- Political contributions receipts
- Disability tax credit claim form completed by authorized health practitioner (T2201)
- Spousal support payments paid
- Adoption

PLEASE ASK FOR MORE INFORMATION IF THE FOLLOWING APPLIES TO YOU.

DEDUCTIONS – EMPLOYEES *

Only if you have a signed T2200 from your employer

UNINCORPORATED BUSINESSES *

Business income and Expenses (T2125)

RENTAL PROPERTIES *

Rental income and expenses (T776)

* These items can be complex in nature and may incur additional fees.