

2017 TAX CHECKLIST FOR MEDICAL RESIDENTS & FELLOWS – COLLINS BLAY LLP

Income (provide slips, documents or details)	
<input type="checkbox"/> T4 slips for employment income <input type="checkbox"/> T4A slips for scholarships and RESP, honoraria and miscellaneous income	<input type="checkbox"/> T5 and T3 slips for investment income

Deductions (provide slips, documents or details)	
<input type="checkbox"/> T2202A for tuition paid <input type="checkbox"/> Details of CMPA paid and reimbursed <input type="checkbox"/> CPSO dues <input type="checkbox"/> RRSP receipts <input type="checkbox"/> Examination fee receipts <input type="checkbox"/> Statement of government student loan interest paid	<input type="checkbox"/> Receipts for monthly (or longer) transit passes (January 1 to June 30 only) <input type="checkbox"/> Medical expenses <input type="checkbox"/> Donation receipts <input type="checkbox"/> T2200 Employment Conditions

Deductions applicable for first year residents	
<input type="checkbox"/> Details of moving expenses (move of 40km or more).	<input type="checkbox"/> Rent receipt from landlord for rent paid during the year in Ontario

Employment expenses for out of town rotations & on-call requirement	
<input type="checkbox"/> Signed T2200 form from employer (e.g., KGH) stipulating that you were required to travel away from Kingston <input type="checkbox"/> Accommodation and travel expenses (if required per T2200) <input type="checkbox"/> Cell phone if required for on-call (per T2200)	<input type="checkbox"/> Vehicle Expenses (if required per T2200): Gas Insurance Lease payments Loan interest Purchase price Vehicle repairs Total mileage driven during the year Total mileage driven for rotation

Other documentation to provide <u>if you are a new client</u>	
<input type="checkbox"/> Copy of last filed income tax return	<input type="checkbox"/> Most recent Notice of Assessment from CRA showing Tuition carry forward and RRSP contribution room