2017 PERSONAL TAX CHECKLIST- COLLINS BLAY LLP

Employment Income (provide slips, documents or details)	
❑ T4 slips for employment income ❑ T5007 – WSIB benefits ❑ Tips or odd jobs	❑ T4 E – Employment insurance benefits ❑ T4PS – Profit sharing ❑ Other – US employment (W2)

Pension, Retirement, Annuity Income (provide slips, documents or details)	
❑ T4A (OAS) – Old Age Security ❑ T4A – Pension or retiring allowance ❑ T4 RIF – Retirement income fund ❑ Foreign – US social security, UK or other pension	❑ T4A (P) – Canada or Quebec Pension ❑ T4 RSP – RRSP withdrawal ❑ T4 RCA – Distributions from a retiring allowance ❑ Other

Self-Employment Income and Rental Income	
❑ Details of all revenues and expenses ❑ Details of vehicle expenses, business-related kilometers and total kilometers travelled in the year	❑ Assets purchased or sold during the year ❑ MicroFIT income and expenses

Investment Income (provide slips, documents or details)	
❑ T3 – Mutual funds, trusts and income trusts ❑ T600 Ownership certificates ❑ T5013 Partnership Income ❑ Interest from personal loans or mortgages ❑ T5 – Investment income – bank interest, term deposits, GICs, dividends	❑ T5008 Statement of securities transactions ❑ Foreign investment income ❑ Royalty income ❑ Income summaries from your broker if applicable

Capital Gains or Losses – sale or exchange of investment or property	
❑ Schedule of realized gains provided by broker and trading summaries (not including RRSP, RRIF, RESP or TFSA accounts)	❑ Real estate and other properties sold or gifted to others – dates, costs, proceeds, expenses ❑ Sale of principal residence

Other Income (provide slips, documents or details)	
❑ Taxable support payments received ❑ Spousal or taxable child support received ❑ Social assistance payments	❑ Scholarships, bursaries, training allowance – T4A ❑ T4A for RESP withdrawals

Over….

Employment related expenses	
☐ Signed T2200, including summary of expenses – travel, auto, communications, etc… ☐ Transport employees – TL 2	☐ Union or Association dues

Investment Expenses (provide slips, documents or details)	
☐ Interest paid on investment loans	☐ Investment management fees

Other Deductions and Credits (provide slips documents or receipts)	
☐ Spousal or taxable child support paid ☐ Interest paid on government or provincial student loans ☐ Donations to registered charities and donations to political parties ☐ Child care expenses – includes after school programs and summer camps for children under age 16 at the beginning of 2017 ☐ Rent or property taxes paid – only if combined family income under $50,000 or if your child is paying rent (**in Ontario only**) away from home (if rent please provide the landlord's name) ☐ Are you a first time home buyer? ☐ Eligible home renovation expenses if you or a family member are 65 years of age or older or eligible for the disability tax credit certificate	☐ Tuition fees paid – T2202A or TL11A (Please inform us either you or another family member has received any reimbursement for tuition fees) ☐ Registered Retirement Savings Plan – RRSP (receipts only – statements not required) ☐ Moving expenses (40 km or more) – for employment or education (if there are taxable scholarships) ☐ Medical expenses – for any 12 month period ending in 2017 – including medical insurance premiums paid ☐ Payments made to nursing homes or for patient care for self or financially dependent relatives including parents ☐ Claims for infirm dependants ☐ Receipts for monthly (or longer) transit passes (January 1 to June 30 only) ☐ Ontario resident seniors (65 or older in 2016) only: receipts for public transit travel (passes or tickets) after June 30

Please provide copies of your 2016 Notice of Assessment and any Reassessments **only if you have not authorized us to communicate with the Canada Revenue Agency on your behalf.** Please also provide copies of your latest instalment notice or summary of instalments paid.

For new clients please provide copies of your last filed tax return including any carry-forwards (RRSP deduction limit or unused contributions, unused tuition, unused capital losses) and notice of assessment and/or reassessment (if applicable).

Collins Blay LLP
CHARTERED PROFESSIONAL ACCOUNTANTS