

2017 Personal Tax Return Checklist

Name(s) _____

Address _____

Email Address _____ Phone# _____ Cell# _____

Please answer all questions and provide details: Yes No Details

Did your marital status change in 2017
(including common law)? _____ _____ _____

(Please provide a copy of separation agreement)
Do you have any new dependants? _____ _____ _____

Are you a Canadian Citizen? _____ _____ _____
If you are a Canadian Citizen, do you
want your name, address, and date of birth
provided to Elections Canada? _____ _____ _____

Did you own any foreign property at any time in
2017 (eg. foreign investments, real estate, etc.)? _____ _____ _____

Income:
Have you provided us with all of your T4,
T5 and/or T3 slips which you expect to receive? _____ _____ _____

Did you sell any stocks or bonds? _____ _____ _____

Did you sell any real estate (other than your home)? _____ _____ _____

Did you buy a new home? _____ _____ _____

Did you sell your home (principal residence)?
Please provide: address, year of acquisition,
cost at acquisition, proceeds of disposition) _____ _____ _____

Did you have any other sources of income in 2017? _____ _____ _____

Deductions:
Did you make an RRSP contribution for 2017? _____ _____ _____
Are you an apprentice? _____ _____ _____
Did you pay any tax installments? _____ _____ _____

Have you provided us with information regarding:

- Interest **paid** on loans used for investing _____ _____ _____
- Investment management fees _____ _____ _____
- Union dues _____ _____ _____
- Tuition fees (yourself or dependant) _____ _____ _____
- (Please have student sign before bringing in)**
- Moving expenses _____ _____ _____
- Employment expenses _____ _____ _____
- Alimony _____ _____ _____
- Childcare _____ _____ _____
- Donations/political contributions _____ _____ _____
- Medical expenses (including travel) _____ _____ _____
- RRSP (including Home Buyers repayment) _____ _____ _____
- Monthly transit passes (Jan to Jun only) _____ _____ _____
- Trades person's tool expenses _____ _____ _____
- Children's fitness and art receipts _____ _____ _____
- Volunteer firefighter's amount _____ _____ _____

PLEASE USE THE BACK OF THIS FORM TO PROVIDE ADDITIONAL INFORMATION

