

Personal Tax Checklist For Tax Year: 2017

Kindly review the list and provide us with all of the relevant necessary information so that we can ensure accuracy and minimize your personal income taxes to the fullest extent possible.

Name:	Spouse's name:
Birth date:	Spouse's birth date:
Social Insurance Number:	Spouse's Social Insurance Number:
Canadian Citizen YES NO	Canadian Citizen YES NO
Children's name(s), birthdates and income (if minors)	Children's name(s), birthdates and income (if minors)
Email address:	Spouse's email address:
Address:	City/Province:
Postal code:	Telephone:
Foreign property: Did you or your spouse own foreign property at any time in 2017 with a total cost of more than CAN\$100,000? YES NO	Disposed of principal residence during 2017? (Provide address, year of acquisition, and proceeds of disposition if yes) YES NO

<i>You</i>	<i>Spouse</i>	Income
<input type="checkbox"/>	<input type="checkbox"/>	Employment (T4)
<input type="checkbox"/>	<input type="checkbox"/>	Employment Insurance (T4E)
<input type="checkbox"/>	<input type="checkbox"/>	Scholarship/Bursary/RESP (T4A)
<input type="checkbox"/>	<input type="checkbox"/>	WCB/Social Assistance (T5007)

Pensions		
<input type="checkbox"/>	<input type="checkbox"/>	Pension (T4A)
<input type="checkbox"/>	<input type="checkbox"/>	Canada Pension Plan (T4AP)
<input type="checkbox"/>	<input type="checkbox"/>	Old Age Security (T4OAS)
<input type="checkbox"/>	<input type="checkbox"/>	RRIF Withdrawal (T4RIF)
<input type="checkbox"/>	<input type="checkbox"/>	RRSP Withdrawal (T4RSP)

Investments		
<input type="checkbox"/>	<input type="checkbox"/>	Interest/Dividend Income (T5/T3)
<input type="checkbox"/>	<input type="checkbox"/>	Estates/Trusts/Mutual Funds (T3)
<input type="checkbox"/>	<input type="checkbox"/>	Disposal of Investments (T5008 or Realized Gain/Loss report from broker)
<input type="checkbox"/>	<input type="checkbox"/>	Partnership Income (T5013)
<input type="checkbox"/>	<input type="checkbox"/>	Accounting Fees
<input type="checkbox"/>	<input type="checkbox"/>	Investment Counsel Fees (Excluding RRSP/TFSA)
<input type="checkbox"/>	<input type="checkbox"/>	Interest on Investment Loans (Excluding RRSP/TFSA)
<input type="checkbox"/>	<input type="checkbox"/>	Sale of Investment Property (Provide lawyer's statement of adjustments for sale and purchase)
<input type="checkbox"/>	<input type="checkbox"/>	Details of Foreign Investments (if cost over \$100,000)

<i>You</i>	<i>Spouse</i>	Deductions - Provide Receipts
<input type="checkbox"/>	<input type="checkbox"/>	RRSP Contributions
<input type="checkbox"/>	<input type="checkbox"/>	Union/Professional Dues
<input type="checkbox"/>	<input type="checkbox"/>	Child Care Expenses
<input type="checkbox"/>	<input type="checkbox"/>	Child/Spousal Support (Provide Details and Agreement)
<input type="checkbox"/>	<input type="checkbox"/>	Employment Expenses (T2200 and Receipts)

Tax Credits - Provide Receipts		
<input type="checkbox"/>	<input type="checkbox"/>	Public Transit Passes
<input type="checkbox"/>	<input type="checkbox"/>	First Time Home Buyer
<input type="checkbox"/>	<input type="checkbox"/>	Disability Amount (Must have filed T2201 with CRA)
<input type="checkbox"/>	<input type="checkbox"/>	Interest on Student Loans
<input type="checkbox"/>	<input type="checkbox"/>	Tuition (Provide T2202A Slip)
<input type="checkbox"/>	<input type="checkbox"/>	Medical Expenses (BC MSP is not tax deductible)
<input type="checkbox"/>	<input type="checkbox"/>	Charitable/Political Donations
<input type="checkbox"/>	<input type="checkbox"/>	Tax Instalments (Provide CRA Statement)
<input type="checkbox"/>	<input type="checkbox"/>	Care Home Expenses

Additional Information Required		
<input type="checkbox"/>	<input type="checkbox"/>	CRA's 2016 Notice of Assessment
<input type="checkbox"/>	<input type="checkbox"/>	Spouse's Net Income if we are not preparing their return
<input type="checkbox"/>	<input type="checkbox"/>	Details of Additional Dependants (if not stated above)
<input type="checkbox"/>	<input type="checkbox"/>	Date of marital status change (if applicable)

Other Income and Deductions - Additional Worksheets Required					
<input type="checkbox"/>	<input type="checkbox"/>	Self Employment Income	<input type="checkbox"/>	<input type="checkbox"/>	Rental Property Revenues and Expenses
<input type="checkbox"/>	<input type="checkbox"/>	Business Related Automotive Expenses	<input type="checkbox"/>	<input type="checkbox"/>	Moving Expenses
<input type="checkbox"/>	<input type="checkbox"/>	Business Use of Home Office Expenses			

Required worksheets are available at our office or online at www.jmi.ca/tax-resources

Please bring in your documents at the earliest convenience.

March and April are extremely hectic. Please bring your documents in as early as possible to ensure adequate lead time to meet filing deadlines.