

Name: \_\_\_\_\_

Tax Year: \_\_\_\_\_

- NEW ADDRESS
- First Time Home Buyer
- Marital Status Change  
Common Law/Marriage/Divorce
- Date of Death

Dependent Information

Name: \_\_\_\_\_ Name: \_\_\_\_\_  
SIN: \_\_\_\_\_ SIN: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

## 2016 PERSONAL INCOME TAX CHECKLIST

Use this Handy Checklist to ensure you have all the documents your tax professional needs to help maximize your refund

- Did you own foreign property at any time with a total cost in excess of \$100,000
- Did you sell property which you are claiming the principal residence exemption \*

### Slips

- All T4 Slips (employment income)
- Employment Insurance Benefits (T4E)
- Interest, Dividends, Mutual Funds (T3,T5)
- Universal Child Care Benefits (RC62)
- Old Age Security and CPP Benefits (T4A-OAS,T4AP)
- Other Pensions and Annuities (T4A)
- Social Assistance Payments (T5007)
- Workers' Compensation Benefits (T5007)
- All other information slips
- T4 RSP
- T4 RIF

*The accuracy of your return will depend on the completeness and correctness of the information you provided. Your co-operation to have all documents to us before **April 20<sup>th</sup>** will ensure we meet the May 1st filing **deadline***

### Receipts

- RRSP Contribution Receipts
- Support for Child/Spouse or common law partner paid or received
- Professional Fees or Unions Dues
- Tool Expenses (Tradespersons)
- Tuition/Educational Receipts
- Transit Pass Receipts
- Charitable Donations \*
- Political Contributions
- Child Care Expenses
- Children's Arts and Sports Programs \*
- Moving Expense
- Interest Paid on Student Loans
- Carrying Charges and Interest Expense
- Exams for Professional Certification
- Teacher and Early Childhood School Supplies \*
- Foreign Tax Paid on foreign income (Tax treaty)
- Home Accessibility Tax Credit \*

\*New or changes in 2016  
Call or email any questions

### Other Documentation

- Notice of Assessment and Prior year Taxes (new)
- Canada Revenue Agency Correspondence
- Sale or deemed sale of stocks, bonds, real estate  
Mutual Fund/Brokerage capital gain/loss statement
- Mortgage Statement/Property Taxes
- Rental Income and Expense Records
- Automobile/Travel Log and Expenses
- Declaration of Conditions of Employment (T2200)
- Employment expenses
- Office in home expenses
- Volunteer Firefighters Certification
- Adoption Expenses
- T2201 Disability Tax Credit (New or On File)
- Medical Expenses

\*\* Include premiums paid for medical insurance coverage inside and outside of Canada plus dental/prescriptions, optometrist, massage therapy and chiropractic not covered by insurance. If you have travelled more than 40 km for treatment not otherwise available nearer to home include mileage, meal and accommodations. Attendant Care/Nursing Home costs  
Visit [www.cra-arc.gc.ca](http://www.cra-arc.gc.ca) type "Medical Expense" in the search



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