

# 2016 Personal Income Tax Checklist

In order to assist us in preparing your 2016 Personal Income Tax return(s) kindly complete the following:

**Personal Information:**

Name \_\_\_\_\_  
 Name \_\_\_\_\_  
 Name \_\_\_\_\_  
 Name \_\_\_\_\_

**Address:**     Same as last year  
                    New (*please complete*):

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**Marital Status:**

Same as last year  
 Changed as of (*date*): \_\_\_\_\_

New marital status (*if applicable*):

Married     Common-law      
 Separated  Divorced                   
 Widowed     Single                                   

**Contact Information:**

Home Phone: \_\_\_\_\_  
 Business Phone: \_\_\_\_\_  
 Cell Phone: \_\_\_\_\_  
 Email: \_\_\_\_\_

**Preferred Contact Method:**

Home Phone                 Business Phone   
 Cell Phone                 Email                   

**Dependant Information:**

Same as previous year  
 New (*please complete chart*)

Name	Date of Birth	SIN	Relationship	Net Income	Return to Be Prepared
					<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No

Are you a Canadian Citizen?  Yes  No

If yes, do you authorize Canada Revenue Agency to give your name, address, date of birth and citizenship to Elections Canada to update the National Register of Electors?  Yes  No

Did you own foreign property at any time in 2016 with a cost of over \$100,000 CDN?  Yes  No  
*(If yes, attach details of such property)*

*Continued on Reverse...*

# 2016 Personal Income Tax Checklist

Please include the following information for each taxpayer:

(If applicable, please check box (✓) if the information is included)

Copy of 2015 Notice of Assessment and prior years' Reassessment Notices (if applicable)

## All income information slips

Employment  T4  T4A  
Universal Child Care Benefit  RC62  
Partnership income  T5013  
Pension payments from employer  T4A  
Interest and dividends  T5  
Mutual fund and other trusts  T3  
Old Age Security  T4A (OAS)

Canada Pension Plan  T4A (P)  
Employment Insurance  T4E  
Income from RRSP  T4RSP  
Income from RRIF  T4RIF  
Purchase and sale of securities  T5008  
Social assistance, WSIB  T5007  
Other (specify)  \_\_\_\_\_

## All official receipts:

RRSP contributions, including  
first 60 days of 2017   
Charitable donations   
Political donations   
Professional dues

Disability credit  T2201  
Education credit  T2202/2202A<sup>1</sup>  
<sup>1</sup>If receipt is from a dependant, please have dependant sign in appropriate place on the form (reverse). If we are not completing dependant's return, please complete the income portion of the form

Self-employment income and expenses (Include HST/GST information, if possible)

Rental property income and expenses

Details of employment expenses (Employees must attach form T2200 signed by their employer)

## Other items:

Support/alimony payments (Please include amount paid or received, the name, address and SIN of payee or recipient, and the date of support agreement)

Child care expenses (Please include receipts)

Children's activity expenses - fitness and arts programs (Please include receipts for expenses paid in 2016 for children 16 and under.)

Moving expenses

Medical expenses (Please include official receipts)

Property taxes or rent paid in the year (Please include the number of months at each location, the address of each location and to whom the amounts were paid, i.e. landlord, municipality)

Instalment payments made during the year (Please include year end statement from CRA)

Void cheque for direct deposit if desired, unless already registered (Please indicate the payments you wish to be direct deposited [tax refund, OAS and/or CPP])

Home accessibility expenses (You may be eligible for certain tax credits if you are 65 or older or living with someone who is 65 or older or you qualify for the disability tax credit and have done improvements to your home to improve the safety and accessibility of your home. Please contact us for more information.)

Carrying charges and interest paid to earn income from investments

Other Credits: Interest paid on student loans, public transit pass expenses, tradesperson's tools expenses &/or teaching supplies expenses (for educators only)

Details of disposition of stocks, bonds and mutual funds. (Please include investment broker monthly statements and year end summaries provided by broker)

Disposition of real estate (Please include original cost, proceeds on sale, purchase date, sale date, ownership)  
**STARTING IN 2016, THIS INCLUDES THE DISPOSITION OF YOUR PRINCIPAL RESIDENCE**