

2017 Personal Income Tax Checklist

INCOME

- Tax information slips (T-slips; e.g. T3, T4, T4A, T5, T4RSP, T4E, T4P, T4A (OAS), T4RIF, T5013, etc.)
- Self-employment revenue and expenses
- Rental property revenue and expenses
- Alimony/Child/Spousal support received (a copy of legal agreement)
- Universal Child Care Benefits (Form RC62)
- Sale of stocks, bonds, mutual funds or real estates
- Other income not reported on T-slips (e.g. foreign income, tips, etc.)
- Other interest and dividends not included in information slips

TAX CREDITS AND DEDUCTIONS

- RRSP Contribution receipts up to February 28, 2018
- First Time Home Buyer tax credit
- Child care expenses
- Child Fitness receipts (\$500 max) and Child Arts receipts (\$250 max) _ **No longer available for 2017**
- Tuition fees yourself or for a dependent (child or grandchild)
- Interest paid on student loans
- Public transit tax credit

TAX CREDITS AND DEDUCTIONS

- Charitable Donations and Political Contributions
- Moving expenses
- Medical expenses
- Union or professional dues
- Interest on money borrowed to purchase investments and investment management fees
- Employment or Tradesperson expenses (form T2200 signed by employer)
- Adoption expenses
- Alimony/Child/Spousal support paid (a copy of legal agreement and proof of payment)
- Legal expenses to establish a right to employment income, pension income or child/spousal amounts
- Disability tax credit for you, your spouse or dependents
- Disability Support expenses

OTHER ITEMS

- 2016 Personal Income Tax Notice of Assessment
- Foreign property owned at any time in 2017
- Province of residence on December 31, 2017

Please email all electronic copies of required documents along with this checklist to meri@shirak.ca or call me at 604 754 4857 to make an appointment.