WARD & UPTIGROVE
CHARTERED PROFESSIONAL ACCOUNTANTS

CLARITY. DIRECTION. RESULTS.
P.O. Box 127, 145 Main Street East
Listowel, ON N4W 3H2
Tel: 519.291.3040 Fax: 519.291.1850
Email: results@w-u.on.ca
www.wardanduptigrove.com

2017 Personal Income Tax Checklist

This checklist is designed to assist you in compiling the information necessary to prepare your 2017 personal tax return. Please attach this form to your documentation.

Name(s): ____

Telephone (____)__________ **Fax (____)__________ Email** ______________________________

Please indicate address, only if changed since 2016 income tax return:

____

____

Marital status (if changed in 2017, indicate change and date) ____________________

New family members:

Name(s): ______________________________ **SIN:** ____________________

Date of birth: ____

Date of adoption: ____

Note: Ensure ALL information slips are provided with your return. Canada Revenue Agency's process of matching information slips to tax returns is very accurate. In certain circumstances, unreported income can be penalized up to 20% of the unreported amounts.

Information Slips (please check applicable):

- ❑ Statement of Trust Income Allocations & Designations – T3
- ❑ Employment – T4
- ❑ Statement of Pension, Retirement, Annuity & Other Income – T4A
- ❑ Old Age Security – T4A(OAS)
- ❑ Canada Pension Plan benefits – T4A(P)
- ❑ Employment Insurance – T4E
- ❑ Statement of Employee Profit-Sharing Plan Allocation & Payments – T4PS
- ❑ Statement of Income from a Registered Retirement Income Fund – T4RIF
- ❑ Statement of RRSP Income – T4RSP
- ❑ Statement of Investment Income – T5
- ❑ Pension Adjustment Reversal (PAR) – T10
- ❑ Statement of Tax Shelter Information – T5003

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- ❑ Statement of Benefits (Workers' Compensation, Social Assistance) – T5007
- ❑ Statement of Return of Securities Transactions – T5008
- ❑ Statement of Partnership Information– T5013
- ❑ Statement of Contract Payments (subcontractor) – T5018
- ❑ Universal Child Care Benefits – RC62
- ❑ Disability Tax Credit Certificate – T2201
- ❑ Tuition, Education, & Textbook Amounts – T2202A
- ❑ Tuition, Education, & Textbook Amounts – University Outside Canada – TL11A

Details of **Other Income** for which no T-slips have been received, such as (please check applicable):

- ❑ Other Employment Income (stock option plans)
- ❑ Business Income, partnership income, and rental income (all revenue & expenses)
- ❑ Alimony, separation allowances, child maintenance (including divorce agreement)
- ❑ Pensions
- ❑ Other investment income
- ❑ Professional Fees
- ❑ Director Fees
- ❑ Scholarships, Fellowships, and Bursaries

Details of **Other Expenses**, such as (please check applicable):

- ❑ Employment related expenses – provide Form T2200, signed by employer
- ❑ Tools acquired by tradespersons and eligible apprentice mechanics.
- ❑ If you have a sole proprietorship/partnership with an apprentice, please provide us with details including the training agreement and wage information for the employee.
- ❑ Business, rental and employment capital purchases (vehicles, equipment, buildings, etc.)
- ❑ Interest on money borrowed to purchase investments
- ❑ Investment counsel fees
- ❑ Moving expenses – including costs of maintaining a vacant former residence
- ❑ Child care expenses (including day camp fees)
- ❑ Alimony, separation allowances, child maintenance (including divorce agreement, and support amount that was paid)
- ❑ Pension plan contributions
- ❑ Business, property and employment travel and/or motor vehicle expenses

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- ❑ Business and employment home office expenses
- ❑ Adoption related expenses
- ❑ Clergy residence deduction information, including Form T1223
- ❑ Nursing Home fees
- ❑ Attendant care costs in a retirement home
- ❑ Property tax bill
- ❑ Rent receipts
- ❑ Interest paid on qualifying student loans
- ❑ Scientific research and experimental development expenses (letters from farm organizations)

Details and **Receipts** for (please check applicable):

- ❑ Registered Retirement Savings Plan (RRSP) contributions
- ❑ Professional and union dues
- ❑ Charitable donations
- ❑ Political contributions
- ❑ Medical expenses for you and dependent person(s) (including travel expenses and certain medical related modifications to a new or existing home). Consider obtaining an annual statement from your medical provider (i.e. dentist, pharmacist)
- ❑ School supplies purchased if you are a teacher or an early childhood educator
- ❑ Alterations/renovations made to a home to enhance mobility or reduce harm, if you qualify for the disability tax credit or are over the age of 65.

Other Items (please check applicable):

- ❑ Details of **all property sales** in 2017, this includes your own **home/principal residence**.
- ❑ Details of **capital gains and losses** realized in 2017.
    - This may be obtained, in some circumstances, by contacting your investment advisor for annual summary. If assistance is required please provide your investment advisors contact information. ______________________________
- ❑ **Province of Residence** at December 31, 2017, other than Ontario ______________________
- ❑ Details regarding RRSP – **Home Buyers' Plan** withdrawals and repayments; and RRSP – **Lifelong Learning Plan** repayments
- ❑ Are you **a first-time home buyer** in 2017? _______. There may be a rebate of a portion of your land transfer tax.

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- ❑ Details on 2017 income tax **instalments**, or payments of tax
- ❑ Details of **foreign property owned** at any time in 2017, if cost is over $100,000, including cash, stocks, trusts, partnerships, real estate, tangible and intangible property, etc. Required details include: description of the property, related country, maximum cost in the year, cost at year-end, income and capital gain/loss for each particular property
    - For property held in an account with a Canadian securities dealer or Canadian trust company, please provide the country for each investment, fair market value of the investments at each month-end, income or loss on the property, and gain or loss on disposition of the property. (Check with your investment advisor. They should be able to provide this information for you)
- ❑ Copy of any **foreign tax returns filed** translated to English
- ❑ Are you or a family member a U.S. citizen, green card holder or born in the United States? You may need to file a U.S. tax return.
- ❑ Were you in the United States for 183 days or more during the last twelve months?
- ❑ Did you provide **in-home care** for a parent or grandparent 65 years of age or over, or an infirm dependent relative?
- ❑ Do you want to be set up for **direct deposit**? If so, please attach VOID cheque
    - If you were set up previously please only provide information if you changed your bank account in the year
- ❑ Include **2016 Notice of Assessment** and, if applicable, **Notice of Reassessments** from the prior year for each family member. This provides us with helpful carryforward information.

Additional notes you think we'll need to know:

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Please note our offices will be closed as of Tuesday, May 1st and will re-open on Friday, May 4th. As such we recommend you have your tax materials in our hands no later than April 23rd, otherwise we cannot guarantee completion of your return by the final due date.