



## Preparing your Personal Income Taxes ❖ 2017 edition

Please take a look at the below checklist and add only the necessary information that applies to you.

*If there are items missing to hand in at a later date, please notify us and provide prior to your filing due date. Attach all receipts with this list.*

### Types of Income to report

- T4 or T4A- Employment/Commission Income
- T4P- Canada and or Quebec Pension
- T4AOAS- Old Age Security Pension
- T4E- Employment Insurance and other benefits
- T3- Income from Trust
- Foreign Income received
- T5- Dividend and Interest Income
- T4RSP- RRSP income
- T4RIF- Registered Income Fund
- T5007- Workers Comp/Social assistance
- T5013- Partnership Income
- Spousal Support Received
- Sales of stocks or real estate (provide details)

Other income types:

- Business  Rental  Pension outside Can.

*(ask for additional summary from our office)*

### Items to Calculate Credits

- RRSP Contributions
- Union dues, Professional dues paid
- Childcare expenses
- T2202A- Tuition Fees  
*(If child transferring to parent, slip must be signed)*
- Interest paid on student loan
- Donation & Political contributions *(Slips required)*
- Monthly public transit statements *(Jan-Jun only)*
- Medical receipts for all family members
- Fertility treatment receipts
- Adoption costs
- Spousal Support payments made  
*(Provide separation agreement if first time reporting)*
- Property tax statement or rent receipts
- Employment Expenses (only if signed T2200)  
*(ask for additional summary from our office)*

### Additional Items to remember to bring with you or tell us about

- Foreign property valued over \$100K CAN
- Purchase of first home *(bring purchase docs)*
- Amounts paid in installments for income tax
- Sale of Principal Residence  
*(provide sale docs, original purchase date and amount)*
- Changes to marital status *(need date of change)*
- Changes to custody/guardianship of children
- New baby or elderly family member joined household
- Member of the household became disabled
- Previous tax return *(only if new client)*