

# 2016 PERSONAL INCOME TAX RETURN CHECKLIST

Complete and return with your materials

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## MATERIALS CHECKLIST

- All Slips T3, T4, T4A, T4AP, T4AOAS, T4PS, T4RIF, T4RSP, T5, T5013, T5007, T5008, T4E, RC62 (UCCB) etc.
- Miscellaneous Income
  - You are required to self-report income that does not have a T-slip
- Capital Gains and Losses
  - Non-registered account statements with disposition details including proceeds and **cost**.
- NEW!** Principal Residence Disposition in 2016
  - Full residence address, year of acquisition, proceeds of disposition
- Rental income and expenses
- Self-Employment Income and expenses
- GST/HST filing forms, if applicable
- RRSP contribution slips, childcare, professional and union dues
- T2200 and eligible employment expenses
- Interest on debt used for business or investment purposes
- Money management fees
- Medical/Dental/Health statements
  - Include health plan premiums and a summary of reimbursed expenses. Your pharmacy will print an annual summary.
- NEW!** Teacher & ECE School Supply credit
  - Qualifying expenses paid, include an employer statement certifying expenses are required for work.
- Children's fitness and art credit receipts
- Public transit passes
  - Epass statements for at least 32 one way trips over 31 days, OR, 5 day unlimited travel passes for 20 days of a 28 day period.
- Charitable and Political donation receipts
- Tuition Fees and student rent receipts
  - T2202, T2202A, or US Tuition TL11A, signed by student if transferring to a parent
- 2015 Notice of Assessment/Reassessment and your 2015 T1 Return, if you are a new client this year
- Income Tax Instalments paid

## PLEASE ANSWER THE FOLLOWING QUESTIONS

Are you a US citizen? Yes (Y) or No (N) \_\_\_\_\_

Do you spend time in the US? If yes, provide number of days: 2016 \_\_\_\_ 2015 \_\_\_\_ 2014 \_\_\_\_

Do you own US property? If yes, describe below (ex. recreational condo, rental property)

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Do you have other US source income? If yes, explain below

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## TELL US IF YOUR TAX STATUS HAS CHANGED

Marital/ dependents/ caregiver/ date of change. (If you require more space, email us the details)

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