

PLEASE CHECK OFF THE ITEMS BELOW THAT ARE APPLICABLE TO YOUR 2017 PERSONAL TAX RETURN. RETURN THIS SCHEDULE TO OUR OFFICE TOGETHER WITH ALL COPIES OF THE RELEVANT DOCUMENTATIONS AS FOLLOWS:

Documents:

- Canada Revenue Agency Correspondence
- Tax Instalments made
- If prior year prepared by another accountant, please attach the full tax return

Income:

- T4 Employment slips and any other taxable benefits not reported on the T4
- T5 Investment slips
- T4A(OAS): Old Age Security
- T4AP: CPP Benefits
- Other information slips (T3, T4A, T4E, RC62)
- Pension income (Canada & Abroad)
- Social Assistance payments
- Workers' Compensation Benefits
- Interest and dividends
- Capital gains/losses record
- Sale of real estate (proceeds, adjusted cost basis, outlays)
- Elected split pension
- Rental income/expenses
- RRSP withdrawals
- Spousal support payments received
- Child support payments Received

- Partnership income/loss (T5013)
- Professional income/expenses
- Commission income/expenses
- Self-employment income/expenses
- Farming income/expenses
- Fishing income/expenses
- GST Rebates received
- Foreign Income
- Stock options exercised

Deductions:

- RRSP Contributions
- Union & professional dues
- Child care expenses
- Moving expenses
- Child support payments made
- Spousal support payments made
- Investment carrying charges – interest, account fees, counsel fees
- Exploration and Development expenses (T101)
- Northern residents Deduction
- Declaration conditions of Employment (T2200)
- Employment expenses
- Automobile logs
- Home office receipts

Tax Credits:

- Medical expense receipts
- Volunteer firefighter's statement
- Search and rescue volunteers' statement
- Public transit receipts
- First-time home buyer – house purchase documents
- Adoption expenses
- Disability tax credit application (T2201) – self or dependant
- Tuition receipts (T2202A, TL11A, TL11B, and/or TL11C) – or those forms signed by the child to transfer to the parent
- Interest paid on student loans
- Charitable donation receipts
- Political donation receipts
- Foreign taxes paid
- Dates spent in the USA (If you vacation extensively in the USA; this will help us determine if you have any US filing requirements)

If we do not prepare the tax return of your spouse, please provide line 236 that will be reported on your spouse's or common law partner's 2017 tax return:

Net Income (Line 236) \$ _____

Marital Status: Please check off your current marital status. If your status changed during the year (in 2017), please provide details and date of change:

Married Common-law Widowed Divorced Separated Single

Date of change (MM/DD/YYYY) _____