

2017 PERSONAL TAX CHECKLIST

Personal information				
First name		Last name		
Street address		City		Prov
Postal code	Birthdate	SIN #		
Home phone:	Cell:	Work phone:		
Email 1:		Email 2:		
Marital status <input type="checkbox"/> Single <input type="checkbox"/> Common Law <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed				
Family changes/dates (birth, marital status, death) -				
Canadian citizen <input type="checkbox"/> Y <input type="checkbox"/> N		American citizen <input type="checkbox"/> Y <input type="checkbox"/> N		
Completing return for spouse/partner? <input type="checkbox"/> Y <input type="checkbox"/> N (if no, please provide Net Income - \$_____)				
Spouse/partner first name		Last name		
Birthdate		SIN #		
Dependents (children or senior parent living with you)				
Name	Address (if different)	Relationship	Birthdate	SIN #
Do you want to provide your address and information to Elections Canada?				<input type="checkbox"/> Y <input type="checkbox"/> N
Do you own stocks or other property outside of Canada for which you paid more than \$100,000CDN?				<input type="checkbox"/> Y <input type="checkbox"/> N
Were you a first time homebuyer in 2017?				<input type="checkbox"/> Y <input type="checkbox"/> N
Did you sell a principal residence in 2017?				<input type="checkbox"/> Y <input type="checkbox"/> N
For self-employed individuals / sole proprietors				
Would you like us to summarize your expenses?		<input type="checkbox"/> Yes, please summarize (note extra cost at \$75/hour)		
		<input type="checkbox"/> No, I've already summarized		
Are you registered for HST/GST? <input type="checkbox"/> Y <input type="checkbox"/> N		Filing period: <input type="checkbox"/> Regular <input type="checkbox"/> Quick		
Would you like us to complete your HST/GST return?		<input type="checkbox"/> Yes (please include required documents)		
		<input type="checkbox"/> No (please provide copy of HST/GST filed)		
Secure delivery of my completed taxes				
In our continued efforts to be a "green" company by becoming a paperless office, we will be providing a digital copy of your completed Personal Tax Return through our secure delivery portal. *A paper copy can be provided upon request.				
I will pick up the documents I provided to you from		<input type="checkbox"/> North Vancouver	or	<input type="checkbox"/> New Westminister
*I would like you to return my documents by		<input type="checkbox"/> Courier	or	<input type="checkbox"/> Registered Mail
*There will be a \$10 surcharge for returning your documents by courier/mail.				
IF THIS IS YOUR FIRST YEAR FILING WITH US, PLEASE PROVIDE A COPY OF YOUR PREVIOUS YEAR'S TAX RETURN. THANK YOU!				

PLEASE CHECK THE ITEMS THAT APPLY TO YOU	
Personal Income	Investment Income
<input type="checkbox"/> T4, T4A - Salaries and employment	<input type="checkbox"/> T3, T5, T4S - Interest and Dividends
<input type="checkbox"/> Other employment benefits	<input type="checkbox"/> T5008 - Statement of Security Transactions
<input type="checkbox"/> T4A (P) - Canada Pension Plan benefits	<input type="checkbox"/> Interest on Tax Refunds
<input type="checkbox"/> T4A (OAS) - Old Age Security benefits	<input type="checkbox"/> T600 - Canada Savings Bonds
<input type="checkbox"/> T4A - Other pension or superannuation	<input type="checkbox"/> T3 - Mutual Fund Income
<input type="checkbox"/> T4RSP - RRSP income	<input type="checkbox"/> Foreign income
<input type="checkbox"/> T4RIF - RRIF income	<input type="checkbox"/> Annuities
<input type="checkbox"/> T4E - Employment Insurance benefits	<input type="checkbox"/> Rental income (full details required)
<input type="checkbox"/> T5007 - WCB benefits/social services benefits	<input type="checkbox"/> Summary of investment contract holdings
<input type="checkbox"/> T1137 - Home Buyers Plan	<input type="checkbox"/> T5013 - Limited partnership income (loss)
<input type="checkbox"/> T4RCA - retirement income	<input type="checkbox"/> Capital gain/losses (full details required)
Other	Business
<input type="checkbox"/> Alimony received	<input type="checkbox"/> Self employment earnings (details required)
<input type="checkbox"/> Taxable child support received	<input type="checkbox"/> Farming/fishing earnings
<input type="checkbox"/> Scholarships/bursaries	<input type="checkbox"/> Professional earnings
<input type="checkbox"/> Other - specify	<input type="checkbox"/> Self-employment commissioned earnings (details req'd)
Non-refundable Credits	Other Deductions
<input type="checkbox"/> Married amount - spouse's net income \$	<input type="checkbox"/> RRSP
<input type="checkbox"/> Equivalent to married amount (full details required)	<input type="checkbox"/> Union/professional dues
<input type="checkbox"/> Disability deductions	<input type="checkbox"/> Alimony paid
<input type="checkbox"/> T2202 - tuition fees/education credit	<input type="checkbox"/> Deductible child support paid
<input type="checkbox"/> Education credit for dependent / dependent net income	<input type="checkbox"/> Interest paid on student loans
<input type="checkbox"/> Medical receipts	<input type="checkbox"/> Interest and carrying charges on investments
<input type="checkbox"/> Charitable donations	<input type="checkbox"/> Investment counsel and accounting fees
<input type="checkbox"/> Attendant care expenses	<input type="checkbox"/> Employment expenses (details required, form T2200)
<input type="checkbox"/> Limited partnership losses of other years	<input type="checkbox"/> Deductible legal fees
<input type="checkbox"/> Monthly transit passes	<input type="checkbox"/> Child care expenses (receipts required)
<input type="checkbox"/> Child fitness receipts	<input type="checkbox"/> Moving expenses (details required)
<input type="checkbox"/> Children's arts tax credit (CATC)	<input type="checkbox"/> TL2 - Claim for boarding and lodging
Other items	Expenses
<input type="checkbox"/> Political contribution receipts	<input type="checkbox"/> Restricted farming losses carry forward
<input type="checkbox"/> Capital losses carry forward	<input type="checkbox"/> Prior year Notice of Assessment
<input type="checkbox"/> Allowable business investment loss	<input type="checkbox"/> Installment payments for current year
<input type="checkbox"/> Employment insurance benefit repayments	<input type="checkbox"/> Details of foreign property held
<input type="checkbox"/> Dependent data (GST credit and child tax benefit)	<input type="checkbox"/> Capital and non-capital losses carry forward
<input type="checkbox"/> Declaration of conditions of employment	
<input type="checkbox"/> Loss carry forward information	

Need more info? Call or email us, or visit our website at lorennancke.com.