

Personal Tax Checklist

Taxpayer ① _____

Taxpayer ② _____

Information slips for the following income:

		①	②
Employment	T4	<input type="checkbox"/>	<input type="checkbox"/>
Pension / other	T4A	<input type="checkbox"/>	<input type="checkbox"/>
CPP	T4A(P)	<input type="checkbox"/>	<input type="checkbox"/>
OAS	T4A(OAS)	<input type="checkbox"/>	<input type="checkbox"/>
EI	T4E	<input type="checkbox"/>	<input type="checkbox"/>
Profit sharing	T4PS	<input type="checkbox"/>	<input type="checkbox"/>
RRSP / RRIF	T4RSP / T4RIF	<input type="checkbox"/>	<input type="checkbox"/>
Interest / dividends	T3 / T5 / T600	<input type="checkbox"/>	<input type="checkbox"/>
Partnership income	T5013	<input type="checkbox"/>	<input type="checkbox"/>
WCB / social assistance	T5007	<input type="checkbox"/>	<input type="checkbox"/>
Other _____		<input type="checkbox"/>	<input type="checkbox"/>

Receipts for the following credits or deductions:

RRSP contributions	<input type="checkbox"/>	<input type="checkbox"/>
Wage-loss replacement plan premiums	<input type="checkbox"/>	<input type="checkbox"/>
Union / professional dues	<input type="checkbox"/>	<input type="checkbox"/>
Childcare expenses (including name, address, and SIN of recipient)	<input type="checkbox"/>	<input type="checkbox"/>
Children's fitness/arts program costs	<input type="checkbox"/>	<input type="checkbox"/>
Tuition / education (T2202)	<input type="checkbox"/>	<input type="checkbox"/>
Student loan interest	<input type="checkbox"/>	<input type="checkbox"/>
Medical expenses including out-of-town travel costs and premiums paid to private plans	<input type="checkbox"/>	<input type="checkbox"/>
Charitable donations	<input type="checkbox"/>	<input type="checkbox"/>
Political contributions	<input type="checkbox"/>	<input type="checkbox"/>
Public transit (January to June 2017 only)	<input type="checkbox"/>	<input type="checkbox"/>
Railway and transport employees (TL2)	<input type="checkbox"/>	<input type="checkbox"/>
Interest paid on investment loans	<input type="checkbox"/>	<input type="checkbox"/>

The following information / documents:

	①	②
If you owned any mutual funds, stocks, bonds, or other investments (excluding RRSPs/RRIFs/TFSA) please provide all the investment statements and the tax reporting package including the statement of realized gains and losses	<input type="checkbox"/>	<input type="checkbox"/>
If you sold any real estate, please provide the Statements of Adjustments from the purchase and from the sale of the property	<input type="checkbox"/>	<input type="checkbox"/>
Alimony / maintenance paid or received	<input type="checkbox"/>	<input type="checkbox"/>
Any foreign pensions received	<input type="checkbox"/>	<input type="checkbox"/>
Any foreign property with a cost greater than \$100,000?	<input type="checkbox"/>	<input type="checkbox"/>
Any other income _____	<input type="checkbox"/>	<input type="checkbox"/>
Moving expenses (see our checklist *)	<input type="checkbox"/>	<input type="checkbox"/>
Employment expenses (see our checklist *)	<input type="checkbox"/>	<input type="checkbox"/>
Rental income (see our checklist *)	<input type="checkbox"/>	<input type="checkbox"/>
Business income (see our checklist *)	<input type="checkbox"/>	<input type="checkbox"/>
Farming income (see our checklist *)	<input type="checkbox"/>	<input type="checkbox"/>
Marital status at December 31 st		
Single	<input type="checkbox"/>	Separated <input type="checkbox"/>
Married	<input type="checkbox"/>	Divorced <input type="checkbox"/>
Common-law	<input type="checkbox"/>	Widowed <input type="checkbox"/>
Your spouse's net income if we are not preparing their return _____		
Names and birth dates of children born or adopted in the year _____		
Are you a first time homebuyer?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Split pensions between spouses?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Any physically or mentally infirm dependants?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Expenses qualifying for BC Seniors' Home Renovation Tax Credit? (If disabled)	Yes <input type="checkbox"/>	No <input type="checkbox"/>

* If any of these items apply to you, please use our Hartwick's Helpful Hints checklists to organize your information. Copies are available from our office or can be downloaded from the resource centre on our website at www.hartwickandco.ca.