



Kerr & Company

CHARTERED PROFESSIONAL ACCOUNTANT

Personal Tax Checklist

Taxpayer ①

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	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"/>
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	<input type="checkbox"/>	<input type="checkbox"/>
Charitable donations	<input type="checkbox"/>	<input type="checkbox"/>
Political contributions	<input type="checkbox"/>	<input type="checkbox"/>
Public transit (Jan - 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"/>

Taxpayer ②

The following information / documents:

	①	②
If you owned any mutual funds, stocks, bonds or other investments (excluding RRSPs/RRIFs/TFAs) please provide all the investment statements and the tax reporting package including statement of gains and losses	<input type="checkbox"/>	<input type="checkbox"/>
If you sold any real estate, provide the <u>statements of adjustments</u> from the purchase and 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 - cost greater than \$100,000	<input type="checkbox"/>	<input type="checkbox"/>
Other income _____	<input type="checkbox"/>	<input type="checkbox"/>
Moving expenses (see our moving worksheet*)	<input type="checkbox"/>	<input type="checkbox"/>
Employment expenses (see our worksheet*)	<input type="checkbox"/>	<input type="checkbox"/>
Rental income (see our worksheet*)	<input type="checkbox"/>	<input type="checkbox"/>
Business income (see our worksheet*)	<input type="checkbox"/>	<input type="checkbox"/>
Farming income (see our worksheet*)	<input type="checkbox"/>	<input type="checkbox"/>
Marital Status at <u>December 31st</u>		
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 <u>not preparing</u> their return	<input type="checkbox"/>	<input type="checkbox"/>
Names and birth dates of children born or adopted in the year	<input type="checkbox"/>	<input type="checkbox"/>
Are you a first time home buyer?	<input type="checkbox"/>	<input type="checkbox"/>
Are we splitting pensions between spouses?	<input type="checkbox"/>	<input type="checkbox"/>
Any physically or mentally infirm dependants?	<input type="checkbox"/>	<input type="checkbox"/>
Expenses qualifying for BC Seniors' Home	<input type="checkbox"/>	<input type="checkbox"/>
Renovation Tax Credit? (if disabled)	<input type="checkbox"/>	<input type="checkbox"/>

* If any of these apply to you, please use the appropriate checklist available on our website for download (www.kerrtaxcpa.com), pick up a hardcopy from our office or we can email you a copy.