



McINTOSH | NORTON | WILLIAMS
chartered professional accountants

2017 Personal Income Tax Checklist

INCOME

- All** tax information slips (T-slips; eg. T3, T4, T4A, T5, T5013)
Please ensure you check for slips on-line (investment, tuition)
- [Self-employment information](#) (business revenue and expenses)
- [Rental property information](#) (rental revenue and property expenses)
- [Alimony/Child support](#) (received) including a copy of legal agreement
- [Capital gains/losses](#) (need proceeds from sale and adjusted cost base)
- [Other income not reported on T-slips](#) (i.e. foreign income, tips, etc)

DEDUCTIONS AND TAX CREDITS

- [RRSP](#) Contribution receipts (for contributions up to March 1, 2018)
- [Union or professional dues](#)
- [Interest on money borrowed to purchase investments and investment management fees](#)
- [Interest paid on student loans](#)
- [Employment expenses](#) or [Tradesperson tool expenses](#) (including [form T2200](#) signed by employer)
- [Alimony/Child support paid](#) including a copy of legal agreement and proof of payment
- [Adoption expenses](#)
- [Tuition fees](#) - T2202A Slip (for yourself or a dependent such as a child or grandchild)
- [Child care expenses](#), Child Fitness receipts (\$500 max) and Child Arts receipts (\$250 max)
- [Moving expenses](#) (if you have relocated for work purposes)
- [Legal expenses](#) (to establish a right to employment income, pension income, child/spousal amounts or respond to the CRA)
- [Charitable Donations](#) and [Political Contributions](#)
- [Medical expenses](#) (including dental work, prescription eyewear, travel medical insurance, and [travel expenses](#) - including travel log, doctor's note for requirement to travel, etc)
- [Public transit tax credit](#) (receipts up to June 30, 2017 only)
- [Disability tax credit](#) – please advise us of any disabilities for you, your spouse, or your dependents
- Please let us know if you are a caregiver for a financially dependent relative**

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DEDUCTIONS AND TAX CREDITS (continued)

- [First Time Home Buyer tax credit](#)
- [BC Seniors' Home Renovation Tax Credit](#) and the [Federal Home Accessibility Tax Credit](#) — claim up to \$10,000 of costs that provide seniors (65+) and/or disabled with increased independence and flexibility to remain in their own homes
- [Volunteer firefighter](#) and/or [Search and Rescue Volunteers](#) who provided more than 200 hours of eligible volunteer services in 2016
- [Eligible educator school supply tax credit](#) — claim up to \$1,000 in supply expenditures if you are a teacher or childhood educator

OTHER ITEMS

- [Tax installments](#) paid for 2017
- Any changes to personal profile: marital status, dependents, address & phone number (Please ensure that we have records of all your dependents)
- [Province of residence](#) on December 31, 2017
- [Home Buyer Plan](#) and/or [Life Learning Plan](#) repayment schedule
- Details on [foreign property](#) owned at any time in 2017
- GST return to file
- Certified copies of Power of Attorney Agreement, if you are representing someone or being represented by someone
- Fill out and sign attached Engagement Letter and return to our office**

NOTICES

- DIRECT DEPOSIT** information (bank account transit, bank, and account information — void cheque or PAD form)
- If you are going to be away on vacation during tax season please inform us and bring in your records as early as possible
- CAUTION: MISSING INCOME SLIPS** — We strongly recommend that you ensure you have all of your income slips. Failure to report all income from all your slips could result in substantial penalties and interest. Always bring in late income slips as soon as possible
- Sale or change in use of your Principal Residence** — **Even if the gain is fully exempt from income tax, we will need the details on the purchase and sale of the property**

IMPORTANT DATES

- March 1, 2018 —last day to contribute to RRSP in order to deduct it on your 2017 tax return
- April 30, 2018—Tax balance due for all 2017 tax returns and filing due for most taxpayers
- June 15, 2018—Tax return filing due for self-employed taxpayers