



2017 PERSONAL INCOME TAX RETURN CHECKLIST

Name: _____ Date of Birth: _____ Instalments paid for the year \$ _____ Mailing address: _____ _____ _____ E-mail _____	Spouse: _____ Date of Birth: _____ Instalments paid for the year \$ _____ Company name: _____ Phone (home) _____ Phone (Business) _____ Fax _____ E-mail _____
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WE INTEND TO ELECTRONICALLY FILE ("E-FILE") YOUR RETURN.

Did you hold foreign property at any time in 2017 with a total cost of more than CAN\$100,000?
(see Appendix A for definition of specified foreign property) Yes No

Are you a **US citizen** or **green-card holder**, or do you **regularly conduct business in the US**? Yes No

Do you authorize CRA to provide your name, address and date of birth to **Elections Canada**
to update your information on the National Register? Yes No

Tax slips for the following income:

- Employment income (T4) _____
- Pension (T4A, T4 OAS, T4AP) _____
- Statement of Partnership income (T5013) _____
- Employment insurance benefits (T4E) _____
- Dividends/Interest/Capital Gains (T5) _____
- Investments (T5013/T5008) _____
- RRSP, DPSP, RRP, RRIF (T4RSP/T4RIF) _____
- Estates/Trusts/Mutual Funds (T3) _____
- Universal Child Care Benefit (RC 62) _____
- RRSP contribution slips _____
- Tuition fees (T2202A or TL11 signed by student) _____
- Statement of resource expenses (T101) _____
- Pension Adjustment Reversals (T10 Slip) _____
- Scholarships & bursaries (T4A) _____
- Social Assistance/Workers Compensation (T5007) _____
- Profit sharing income (T4PS) _____
- Other _____
- Other _____
- Other _____

Summary of other items:

- Charitable donations \$ _____
- Political donations \$ _____
- Public transit passes \$ _____
- Union/Professional dues \$ _____
- Child care expenses \$ _____
- Support payments paid or received \$ _____
- Interest paid to earn investment income \$ _____
- Investment counselor fees \$ _____
- Student Loan interest paid \$ _____
- Medical expenses \$ _____
- Teacher's school supply credit \$ _____
- Home Buyers' Plan withdrawal/payments \$ _____
- Lifelong Learning Plan withdrawal/payments \$ _____
- First-time Home Buyer's amount \$ _____
- Moving expenses \$ _____
- British Columbia Senior Home Reno Credit \$ _____
- Child recreation/fitness expenses \$ _____
- Child artistic/cultural expenses \$ _____
- Other _____ \$ _____

Documents for the following transactions:

- Last year's Notice of Assessment
- Investment summary statement
- Sale of Real Estate

Schedules to be attached:

- Employment expenses
- Rental income and expenses
- Self employment income/expenses

Marital Status:

Marital status as at December 31:

Single Separated/Divorced

Married Common-law

If marital status changed during the year, please provide date (YY-MM-DD): _____

see over

Dependants:

Dependants not listed on your prior years' return:

Name _____
Birthdate _____
Relationship _____
SIN _____
e-mail _____

Name _____
Birthdate _____
Relationship _____
SIN _____
e-mail _____

Did you sell you principal residence during the year? Yes No
*If yes, please provide purchase and sale information and inform us
If you have more than one personal use property*

Do you provide in-home care for a parent or grandparent 65 or older? Yes No
If yes, please provide the above information.

Did you incur any adoption related expenses during the year? Yes No
If yes, please indicate amount: _____

Spouse's Tax Return Information:

If Johnsen Archer is not preparing your spouse's return, please provide the following:

Spouse's net income from line 236 of his/her 2017 tax return \$ _____
Universal Child Care Benefit from line 117 of his/her 2017 tax return \$ _____
Universal Child Care Benefit repayment from line 213 of his/her 2017 tax return \$ _____

Other Information:

Do you, your spouse or any of your dependents qualify for the disability tax credit? Yes No
If yes, please indicate whom: _____
Please provide a copy of Form T2201 *Disability Tax Credit Certificate* (if first year of claim).

Did you complete a minimum of 200 hours of volunteer fire-fighting/ search and rescue services in the year? (includes responding to calls, being on call, attending meetings and training related to prevention and suppression of fire). Yes No

Have you registered to be eligible for Employment Insurance Special benefits? Yes No

Unless otherwise indicated, we will assume the default response to the questions below:

Do you want your tax refund deposited directly to your bank account? Yes No **Default**
If yes, please attach a void cheque. Direct deposit has been setup previously **No**

Do you authorize for the registration for the CRA online mail service? Yes No **No**
If yes, all future notices and correspondence from CRA will be delivered online through CRA My Account. Must be registered for CRA My Account. Setup previously

Comments (attach a separate sheet if required):
