

A Checklist for next year's income tax preparation:

Income Slips

T4	Employment Income
T4A	Certain Scholarships
T4A	Other Pensions and Annuities
T4A(OAS)	Old Age Security
T4AP(CPP)	Canada Pension Plan
T4E	Unemployment Insurance (EI)
T4RSP	Retirement Savings Plan
T4RIF	Retirement Income Fund
T3	Investment Income from Mutual Funds, REITS, ETFs (T3's may be mailed to you as late as March 31)
T5	Interest and Dividends
T5007	Social Assistance and Worker's Compensation Payments
T5008	Income from Securities Transactions
RC62	Universal Child Care Benefit Statement
T2200	Declaration of Conditions of Employment
T2202A	Tuition, Education and Textbook Amounts Certificate

Receipts

-Adoption Expenses	-Moving Expenses Related to Employment
-Attendant/Nursing Home Care Expenses (with Disability)	(if move greater than 40 Kms.)
-Automobile/Travel Logbook and Expenses	- Home Accessibility Renovations
-Business, Farm or Fishing Income/Expenses	(incurred by those 65 and older or with disability)
-Canada Revenue Agency Correspondence	- Political Donation Receipts
-Charitable Donations	- Prior year's Notice of Assessment from
-Child Care/Child Support Payments/	Canada Revenue Agency
- Children's Fitness and Arts Programs (2016 is final year)	- Property Taxes/Rent Receipts
-Disability Tax Credit Certificate	- Rental Income and Expense Records
-Foreign Assets/Property over \$100,000 as	- RRSP Contributions
there are extra filing requirements	- Spousal Support Payments (paid/received)
-Information on Capital Gains in the year on sales	- Student Loan Interest
of Investments, Stocks or Real Estate, Realized Gain	- Tax Instalment Payments made
or Loss Report from your Investment Advisor	- Transit Passes or Receipts
-Medical Expenses (including travel if over 40 kms.)	- Union and Professional Fees
-Teaching/Classroom supplies for Teachers (new 2016)	- Volunteer Firefighters Certification

Canadian Citizen? Y / N

Do you authorize CRA to provide name, address and date of birth to Elections Canada for voters' registry? Y / N

Did you sell your principal residence in the year? (New 2016) Y / N

Do you hold Foreign assets or property (cash, investments, rental property) with a cost over \$100,000? Y / N

Please advise us of any changes in the following:

New Dependent(s): Full Name _____ Date of Birth _____

Change in Marital Status: Details _____ Date of Change _____

Change in Address: _____

Change in Telephone Number: _____