



2016 PERSONAL INCOME TAX CHECKLIST

NAME: _____ DAYTIME PHONE: _____

EMAIL: _____ EVENING PHONE: _____

DATES OUT OF TOWN BETWEEN NOW AND APRIL 30, 2017, IF APPLICABLE

QUESTIONS	YES	NO	INFORMATION REQUIRED IF YES
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Note: All your returns will be e-filed.

A) **PROCESSING**

Would you like a printed copy of the Entire return instead of a Jacket Outline? Outline? (Additional processing fees will apply)

Do you authorize the Canada Revenue Agency (CRA) to provide your name, Address and date of birth to Elections Canada?

Do you own foreign property? (T1135 Form may be required)

Please select method of return
Delivery to you.
Email
Pick up

Would you like to register for CRA online mail by providing the CRA with your email address?

Email address: _____

QUESTIONS	YES	NO	INFORMATION REQUIRED IF YES
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B) PERSONAL INFORMATION

- | | | | |
|---|--|--|---|
| 1. Are you a new client of CC&C? | | | Please provide the name, address, SIN, and date of birth for all family Members for whom we are to Prepare a personal income tax return. Please provide the prior year return and assessment. |
| 2. Has your basic information changed From 2015? | | | Provide the details of new name |
| 3. Do you have any children who were Born in 2016? | | | Provide names, SIN, dates of birth and income details. |
| 4. Did you get married or enter into a common-law relationship in 2016? | | | Provide name, date of marriage, SIN and date of birth of your spouse or common law partner |
| 5. Are we preparing your spouse's 2016 tax return? | | | If no, indicate amount of your spouse's net income \$_____ (line 236). |
| 6. Was your spouse or common-law partner Self-employed in 2016? | | | |
| 7. Did you get separated or divorced in 2016? | | | Provide date of separation or divorce. Describe transfers made to spouse. |
| 8. Are other persons dependent upon you because of their age or disability? | | | Provide names, address, SIN, date of birth, disability certificate, detail of Infirmities and income information for each dependant. |

C) RESIDENCY

- | | | | |
|--|--|--|-----------------------------------|
| 1. Province of residency on December 31, 2016: Ontario | | | If no. list province of residency |
|--|--|--|-----------------------------------|

QUESTIONS	YES	NO	INFORMATION REQUIRED IF YES
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2. Did you become or cease to be a Canadian resident in 2016?

3. Are you a Canadian Citizen?

4. Are you a U.S. citizen?

Last US Returns Filed

D) EMPLOYMENT INCOME

1. Did you have employment income?

Present your T4s and details of the benefits from employment not appearing on T4 slip.

2. Did you receive gratuities and tips?

State the amount here.

3. Did you incur employment expenses?

Provide the details of automobile, travel, Parking, meals, etc. together with form T2200.

4. Did you receive employment insurance benefits?

Present the T4E slips.

5. Did you dispose of a share in which you Previously elected to defer the security Options benefit?

Provide details here.

E) SELF-EMPLOYED INCOME

1. Did you have any self-employed income?

Provide the details of income and expenses.

2. Did the business activity change from the prior year?

Describe such changes.

3. Does your business earn income from internet webpages and websites?

Provide the number of internet webpages and websites of the business.

Provide percentage of gross income from websites

Provide main webpages/website addresses

_____ %



QUESTIONS	YES	NO	INFORMATION REQUIRED IF YES
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4. Do you own depreciable assets in your business?

F) INVESTMENT INCOME

1. Did you receive interest, dividends (eligible or non-eligible) or royalties?

Present your T5, T3 slips.

2. Did you earn income from compound or foreign investments?

Provide details of income earned in year and foreign tax paid (if any).

3. Did you dispose of a T-bill?

Present your T5008 slips.

4. Did you redeem Canada Savings Bonds?

Present your T600 slips.

5. Did you own any partnership interests?

Provide the details of the original investment, income/loss allocations and contributions/distributions since inception and T5013 slips.

6. Did you own a rental property?

Provide the address of property, original cost and details of income and expenses.

7. Did you dispose of shares, bonds, real estate or other properties?

Provide the details of original cost, selling price and cost of disposition.

8. Were any of the dispositions to related persons?

Provide details here.

9. Did you redeem your shares in a Quebec labour-sponsored fund?

Provide details here.

10. Have you entered into any flow-through share agreements?

Provide details here.

QUESTIONS	YES	NO	INFORMATION REQUIRED IF YES
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G) OTHER INCOME

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|----|---|--|---|
| 1. | Did you receive pension income or withdraw money from an RRSP, RRIF or RDSP?
RDSP?
Do you want to split your pension income with your spouse or partner if it is advantageous tax wise to do so? | | Present the T4A (OAS), T4A (P), T4A, T4RSP, T4RIF slips, gross amount of your foreign pension income received,etc |
| 2. | Did you receive spousal or taxable child support? | | Provide details of amounts received and copy of relevant agreement and amendments (if not previously supplied to us). |
| 3. | Did you receive workers' compensation, social assistance payments or net federal supplements? | | Present your T5007 slips. |
| 4. | Did you receive payments under the Universal Child Care Benefit program (UCCB) RC62 Form? | | Provide details of amounts received for 2016. |
| 5. | Are you a single parent and wish to have the UCCB amounts included in your eligible dependant's return? | | |
| 6. | Did you receive any other income? | | Provide details of prizes, bursaries, grants |

H) GENERAL DEDUCTIONS/CREDITS

- | | | | |
|----|---|--|---|
| 1. | Did you contribute to an RRSP? | | Present your RRSP receipts. |
| 2. | Did you contribute and/or your employer contribute to an PRPP? | | Present your PRPP receipts. |
| 3. | Did you or your spouse purchase your first home making you eligible for the First Time Home Buyers' Tax Credit? | | Provide details of the purchase and list of any homes owned by you or your spouse in the last four years. |

QUESTIONS	YES	NO	INFORMATION REQUIRED IF YES
4. Did you make a withdrawal/repayment under the Home Buyer's or Lifelong Learning Plans?			Provide details of repayment and a copy of the Home Buyer's Plan or Lifelong Learning Plan.
5. Did you pay professional, union or similar dues?			Present the receipts.
6. Did you pay professional examination Fees to an educational institution, Professional association, provincial Ministry or other similar institution? The examination must be mandatory to obtaining a professional status recognized by a federal or provincial statute, or to be licensed and/or certified as a tradesperson, to allow the person to practice a profession or trade in Canada.			Present the receipts.
7. Did you incur childcare expenses?			Provide details of daycare, camp, babysitting costs including name and SIN of the babysitter and receipts.
8. Did you enrol your child (under the age Of 16 or under the age of 18 if eligible For the disability tax credit) in a program physical activity eligible for the Child's Fitness Tax Credit?			Present the receipts.
9. Did you enrol your child (under the age of 16 or under the age of 18 if eligible for the disability tax credit) in a prescribed program (i.e., artistic, cultural, recreational or developmental activity), which is eligible for the Children's Art Tax Credit?			Present the receipts.
10. Did you pay spousal or taxable child Support?			Provide the details of the amounts paid and copy of relevant agreement and amendments (if not previously supplied to us).

QUESTIONS	YES	NO	INFORMATION REQUIRED IF YES
11. Did you move 40 km or more to be closer to your new work, business location or school during 2015 or 2016?			Provide the date of move and date you started your new job, business or studies. Include details of expenses incurred and distance from old/new residence to new workplace/school.
12. Did you have any new or outstanding debts that were incurred for investment or business purposes?			Provide the information on the purpose of the loan and the interest paid.
13. Did you incur accounting, investment counsel or management fees-excluding RRSP fees?			Indicate amounts paid \$_____.
14. Were public transit passes purchased for you, your spouse or partner or any of your children under the age of 19?			Please provide your receipts and passes.
15. Were you or your dependants enrolled in full/part time attendance at university or college.			Present the T2202 slips. (Please have the dependant sign the back of form T2202 Or form TL11A for a foreign university).
16. Did you or your dependant pay interest on a student loan?			Provide the details.
17. Did you make any charitable donations or Political contributions?			Present the official receipts. If you donated securities or ecologically sensitive land, please provide details including transaction dates.
18. Did you incur any expenses with respect to the adoption of a child?			Present all the adoption expenses.
19. Did you incur any medical or attendant care expenses for you or a dependant?			Present the medical receipts including private health and dental plans and details of attendant care.
20. If you are eligible to claim the disability amount, did you receive part-time attendant care in a retirement home?			Present Form T2201 (if not previously provided to us) and proof of payment that shows the actual amount paid for attendant care.

QUESTIONS	YES	NO	INFORMATION REQUIRED IF YES
21. Did you acquire an approved share of the capital stock of a prescribed labour-sponsored venture capital corporation?			Present the T5006 or official provincial slips.
22. Did you incur eligible expenses in 2016 for improvements to your Principal residence to allow a senior To gain access to, or be more mobile or functional within the home or to reduce harm to a senior within the home?			Indicate amounts paid \$ _____
I) <u>MISCELLANEOUS</u>			
1. Did you pay income tax instalments?			Provide details of payments and a copy Of CRA statement of account.
2. Do you and your spouse or partner together earn less than \$40,000 and did you pay property taxes or rent?			Indicate amounts paid: \$ _____ and name of landlord or municipality _____
3. Were you assessed for 2015 or reassessed for any preceding year?			Present copies of all assessments and reassessment notices.
4. Did you dispose of a principal residence in 2016?			Provide dates purchased and sold Details of original purchase price Details of proceeds of disposition, and number of years the property was your principal residence

PLEASE ATTACH ALL REQUIRED AND COMPLETED INFORMATION TO THIS CHECKLIST FOR EACH QUESTION CHECKED “YES”.