

# Personal Tax Checklist

This checklist is a handy tool to remind you of various tax reporting requirements, credits and deductions.

# 2017

## Personal Information and Other

- Changes to personal information (*address, phone number, marital status, dependents, etc.*)
- Sale of principal residence
- Foreign assets with cost > \$100k
- First-time home buyer
- Northern Residents Deduction
- Disability Tax Credit Certificate
- Canada Caregiver Tax Credit

## Slips

- T4 (employment income)
- T4A (other income)
- T4A-P (CPP pension)
- T4A-OAS (Old Age Security)
- T5 (dividends, interest)
- T3 (investment income)
- T4E (employment ins.)
- T4RSP (RRSP withdrawals)
- T5007 (WCB, social assist)
- T4RIF (retirement income)
- T2202A (tuition)
- T5013 (securities tx)

## Receipts

- RRSP contributions
- Donations
- Medical expenses
- Union dues
- Child care expenses
- Spousal support
- Student loan interest
- Public transit pass (*to June 30*)
- Moving expenses
- Volunteer firefighter/SAR
- Adoption expenses
- Home accessibility credit

## Investments (Stocks, Bonds, Mutual Funds, Loans, etc.)

- Capital gains/losses summary
- Interest paid on investment loans
- Management fees expenses
- Sale of small business corporation shares
- Uncollectible business loans/investments

## Business Activities (including Farming and Fishing)

- Sales/revenues
- Expenses by category (*advertising, office, supplies, telephone, professional fees, rent, repairs, capital assets, etc.*)
- Automobile log book
- Business use of home expenses (*utilities, mortgage interest, property tax, insurance, size of area for business use*)

## Rental Activities

- Rental income
- Expenses by category (*utilities, mortgage interest, property tax, insurance, repairs, maintenance, strata fees, travel, etc.*)
- Size of rental space
- Size of personal living space

## Employment Expenses

- T2200 signed by employer
- Expenses by category (*advertising, office, supplies, telephone, professional fees, travel, tools, automobile, etc.*)

## Other Info



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