JONES & O'CONNELL LLP — 2017 PERSONAL INCOME TAX CHECKLIST

USE THIS CHECKLIST TO ENSURE YOU HAVE GATHERED ALL OF THE NECESSARY INFORMATION TO COMPLETE YOUR PERSONAL INCOME TAX RETURN

New for 2017 The following supporting documents MUST be provided if applicable:

- Court orders for support payments
- Tuition credit transfer with student signature on reverse side of the tax slip
- Conditions for supporting a dependent*
- Union or professional dues
- Property tax assessments or rent receipt(s)
- Medical receipts/invoices
- Donation slips from registered charities

- ☐ Dispositions of personal residences must be disclosed. Please inform us if you sold your home in 2017.
- ☐ Did you purchase or sell property such as home, cottage or rental property during the year? If so, provide details for every property including proceeds of disposition, acquisition information and all related expenses.
- ☐ Do you have any new dependents during the year? If so, provide names, date of birth, SIN, taxable income (if applicable).
- ☐ Banking information (void cheque) for CRA direct deposit, if not already set up.
- ☐ Do you own foreign property with a cost amount over $100,000? If so, provide property information including address, income earned from the property and acquisition or disposition information.

Additional charges will apply if information is incomplete

Other Details

EMPLOYMENT EXPENSES
- ☐ Union, Professional or Similar Dues
- ☐ TL2 - Meals & Lodging (Completed)
- ☐ Vehicle & Office (Form 2200)
- ☐ Sales Expenses (Summarized)
- ☐ Moving Expenses

SELF-EMPLOYMENT INCOME
- ☐ Summary of Income & Expenses
- ☐ Assets Purchased/Sold
- ☐ Salary Paid to Employee(s)
- ☐ Inventory, Accounts Receivable
- ☐ Home Office, Business Use Vehicle

RENTAL INCOME
- ☐ Summary of Income & Expenses
- ☐ Purchase of Rental Property – Details
- ☐ Sale of Rental Property – Details
- ☐ Split - Personal & Rental Use
- ☐ Assets Purchased/Disposed

INVESTMENT INCOME AND EXPENSES
- ☐ Investment Trading Summary
- ☐ Interest Paid
- ☐ Investment Management Fees
- ☐ Legal fees to Collect Income/Support
- ☐ Accounting Fees to Record Income

DEDUCTIONS AND CREDITS
- ☐ RRSP Contributions/T5006
- ☐ Adoption Expenses
- ☐ Public Transit Passes (to July 1, 2017)
- ☐ Tuition Fees (T2202), Student Interest
- ☐ Child Care
- ☐ Marital Status Change

OTHER
- ☐ Tips & Gratuities
- ☐ First Time Home Buyer
- ☐ Donations & Political Contributions
- ☐ Spousal Support Payments Paid/Received
- ☐ U.S. Social Security, Foreign Pensions

* **Dependents**
Details of any dependents aged over 18 and physically or mentally impaired, including medical certification or custody arrangements for single parents.

Seniors
Consideration of health issues that may qualify for the Disability Tax Credit application.