



JSWerry Bookkeeping Services

2017 Tax Preparation Checklist

Important: Please also provide a detailed copy of your previous year's tax returns along with your Notice of Assessment for the 2016 and receipts for any tax instalments made during the year. Sign up for your [MyAccount](#) (click the link) to have access to your form and personal information online with the CRA.

Personal information

For: self, spouse and dependents

- Name, address, birth dates, SIN #, email address, phone number

- address changes, marital status (with date of change)

Status regarding Canadian Indian

Immigrant, emigrant or non resident taxpayer

Tax return for a deceased person

Capital dispositions (sale/redemption of mutual funds, sale of shares, real estate)

Details of rental income earned and expenses - Property tax OR rent paid on your residence (receipts are imperative for claim)

Personal Claims

Child care

- name, address and social insurance number of daycare provider required

Children's fitness and art receipts

Alimony/ child support paid - name, address and social insurance number of person receiving payments required, and a copy of the separation/ support agreement if not previously submitted

Interest on student loan payments

Ontario Senior Homeowners' Property Tax Grant Notice

RRSP Contributions

UCCB (Universal Child Care Benefit – RC62)

Charitable Donations (Registered Charities – receipts must be provided)

Medical Expenses (certification required for prescriptions, travel over 40 kms, meals, etc...)

Foreign income

T Slips

T4, T4A – wages and pension income

T3, T5, T5008 – Interest and Investment Income

T5007/RL-5 Social Assistance, worker's comp

T5013/T5013A – Statement of partnership income

T600 – Canada Savings Bonds, etc...

T4OAS – Old age security

T4E – Employment insurance

T4RIF, T4A, T4RSP – Pension and annuity income

T2202A – Tuition receipts (if transferring, signature and name of designation required)

Union or professional dues not of T4 slips

Investments and Property

Details of foreign property owned - shares of foreign companies, rental properties, etc...

Investments on which interest has been earned, but not received

Business

Details of business income and expenses Union/ Association Dues

Health and dental plan costs (self-employed)

Charitable Donations (receipts must be provided)

Business Use of Home Office

Compile these expenses for a yearly total to be prorated for the use of space in your house to earn business revenue:

- Heat
- Hydro
- Mortgage interest
- Property tax
- House insurance
- Telephone and internet
- Repairs and maintenance

Business Use of Vehicle

Compile these expenses for a yearly total to be prorated for the use of your vehicle to earn business revenue:

- Car insurance
- Parking
- Gas and oil
- Car/ lease payments with amount of interest if included
- Repairs and maintenance
- KM'S driven for the year total and KM's driven for the year for business