

2017 TAX CHECKLIST

BEFORE YOUR APPOINTMENT, we want to make sure you have all slips and or receipts in order to make sure your tax appointment is efficient and timesaving.

Please make sure you go through the following checklist below to allow us to help you get every penny you deserve!

Handy checklist:

SLIPS

- T4 SLIPS (Employment income)
- Employment insurance benefits (T4E)
- Interest dividends, mutual funds (T3, T5, T5008)
- Tuition/education receipts (T2202A)
- Old Age Security and CPP benefits (T4A-OAS, T4AP)
- Other pensions and annuities (T4A)
- Social assistance payments (T5007)
- Worker's Compensation benefit (T5007)
- All other information slips

RECEIPTS

- RRSP contribution
- Support for a child, spouse or common-law partner
- Professional or Union dues
- Tool expense (Tradesperson & apprentice Mechanics)
- Other employment expenses
- Teacher's school supplies
- Medical expenses (**DOCTORS NOTE & RECEIPTS**)
- Home renovations (seniors and disabled)
- Transit pass receipts (before July 2017)
- Charitable donation
- Political contributions
- Child care expenses
- Adoption expenses

RECEIPTS

- Moving expense
- Interest paid on student loans
- Carrying charges and interest expense
- Office-in-home expenses
- Exams for professional certification

OTHER DOCUMENTATION

- Notice of Assessment/Reassessment
- Canada Revenue Agency correspondence
- Sale of principal residence
- Sale or deemed sale of stocks, bonds or real estate
- Northern resident deductions receipts
- Rental income and expense receipt
- Business, farm or fishing income/expenses
- Automobile/Travel logbook and expenses
- Disability Tax Credit Certificate
- Declaration of Conditions of Employment (T2200)
- Volunteer Firefighters certification
- Search and Rescue volunteer's certification
- Written certification for eligible educator school supplies

NORTHERN TRAVEL BOX 32

- Please have your receipts including all airfare, car rental, parking, hotel and gas receipts
- Must have travel dates
- If claiming mileage, we need proof of trip

