

BARBARA L. PRICE LTD.

CHARTERED PROFESSIONAL ACCOUNTANT

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2016 PERSONAL TAX SLIP CHECKLIST

Name: _____

SIN: _____ Birth date: _____

Spouse's name: _____

SIN: _____ Birth date: _____

Address: _____

Dependant's Name(s), SIN(s), Birth date(s) and Income(s):

Phone Number: _____

Email address: _____

INCOME

- ☐ T4 - Employment income
- ☐ T4 (OAS) - Old Age Security
- ☐ T4A (P) - CPP benefits
- ☐ T4A - Other pensions and annuities
- ☐ T4E - Employment Insurance Benefits
- ☐ T5007 - Social assistance
- ☐ T5007 - Workers' Compensation Benefits
- ☐ T3 - Trust income, interest and dividends
- ☐ T5 - Interest and dividends
- ☐ T5008 - Statement of securities transactions
- ☐ T5013 - Partnership income - details
- ☐ T4RSP - RRSP income or withdrawals
- ☐ T4RIF - RRIF income or withdrawals
- ☐ RC62 - Universal Child Care Benefits
- ☐ Business & professional income / expenses
- ☐ Commission income
- ☐ Farming activities income / expenses
- ☐ Foreign pension or other income
- ☐ Rental income and expense details
- ☐ Sales or deemed sales of stocks, bonds or real estate
- ☐ Spousal support received
- ☐ Miscellaneous or other income

OTHER DOCUMENTATION

- ☐ **NEW** - Sale or change in use of principle residence details
- ☐ Details of specified foreign property including shares of US or other foreign countries held in a non-registered Canadian investment account with a total cost of more than \$100,000 CAD at any time during the year
- ☐ Disability tax credit (if new, Form T2201 required)
- ☐ Instalments
- ☐ Last year's T1 Notice of Assessment
- ☐ Last year's tax return (new client's only)

DEDUCTIONS AND CREDITS

- ☐ T5013A - Tax Shelter write-offs
- ☐ T101 - Flow-through shares
- ☐ T2202 - Tuition receipts
- ☐ Adoption expenses
- ☐ Automobile / Travel logbook and expenses
- ☐ BC Senior's Home renovation tax credit receipts
- ☐ Caregiver for any family member - details
- ☐ Carrying charges and interest expenses
- ☐ Charitable donation receipts
- ☐ Child care expenses
- ☐ Children's fitness receipts
- ☐ Children's arts program receipts
- ☐ **NEW** - Eligible Educator School Supply tax credit receipts
- ☐ Employment related expenses (Form T2200 required)
- ☐ Exploration and development expenses
- ☐ **NEW** - Home accessibility tax credit receipts
- ☐ Interest paid on student loans
- ☐ Medical expense receipts (or summary)
- ☐ Medical travel receipts (or summary)
- ☐ Moving expenses (>40km for employment or school)
- ☐ Northern resident deductions
- ☐ Office in home expenses
- ☐ Other deductions
- ☐ Political contribution receipts
- ☐ Public transit passes
- ☐ Purchase of new construction home or first home - details
- ☐ RRSP contribution receipts
- ☐ Spousal support paid / Alimony
- ☐ Stock option and share deductions - details
- ☐ Tool expenses (Tradespersons)
- ☐ Volunteer Firefighters certification
- ☐ Volunteer Search & Rescue certification
- ☐ Union or professional dues - receipt