

BARBARA L. PRICE LTD.

CHARTERED PROFESSIONAL ACCOUNTANT

P.O. Box 263, Unit #2 - 175 Second Ave W, Qualicum Beach, BC V9K 1S8
Email: blp_ca@telus.net Fax: 1 (888) 692-6970 Phone: (250) 752-7072

2017 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

- Business / professional & Rental income / expenses (**see the Business and Rental Income Checklist**)
- Commission income
- Farming activities income / expenses
- Foreign pension or other income
- Sales or deemed sales of stocks, bonds or real estate
- Spousal support received
- Miscellaneous or other income

OTHER DOCUMENTATION

- Sale or change in use of **principle residence details**, even if not taxable, it **MUST** be reported on your return
- 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 (new client's only)
- 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
- BC Senior's Home renovation tax credit receipts
- Caregiver for any family member - details
- Carrying charges and interest expenses
- Charitable & political donation receipts
- Child care expenses
- n/a Children's fitness receipts – eliminated 2017
- n/a Children's arts program receipts – eliminated 2017
- Eligible Educator School Supply tax credit receipts
- Employment related expenses (Form T2200 required)
- Exploration and development expenses
- Home accessibility tax credit receipts
- Interest paid on student loans
- Medical expense receipts (or summary) – ****obtain annual summary from your pharmacy, dentist etc.**
- Medical travel receipts (or summary) **** include doctor's referral or appointment confirmation**
- Moving expenses (>40km for employment or school)
- Northern resident deductions
- Public transit passes – **Jan to Jun 2017 only**
- 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 Form T2200 required)
- Volunteer Firefighters certification
- Volunteer Search & Rescue certification
- Union or professional dues – receipt

Please drop off your documents as soon as possible * before March 31, 2018

*** before April 13, 2018 for taxpayers with T3 Trust Income**

Tax payments deadline : April 30, 2018

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2017 PERSONAL TAX – BUSINESS and RENTAL INCOME CHECKLIST

Name: _____

GST #: _____

Business name: _____

Business Phone number: _____

Business address: _____

Business Email: _____

Business Website: _____

INCOME

- Business income – farming, fishing, professional, commission
- Partnership income – provide your % partnership interest, partner's name, address and social insurance number (SIN)
- Rental income – provide details of your % ownership and name, address and SIN's of all joint or co-owners

GST / HST

- GST/HST returns to be filed by our office

EXPENSES

- Provide receipts for property, equipment and other capital assets purchases
- Inventory value December 31 \$ _____
- Cost of goods sold including inventory purchases
- Operating expenses
 - Advertising
 - Bad debts (uncollectible accounts)
 - Business taxes, fees, licences, dues, memberships and subscriptions
 - Delivery, freight and express
 - Fuel costs (excluding automobile)
 - Insurance - business
 - Interest – business loans
 - Maintenance and repairs
 - Management and administration fees
 - Meals and entertainment
 - Office expenses
 - Supplies
 - Legal, accounting and professional fees
 - Rent and property taxes (excluding business use of home)
 - Salaries, wages and benefits (include T4's)
 - Travel (excluding automobile)
 - Telephone (excluding business use of home)
 - Utilities (excluding business use of home)

INTERNET BUSINESS ACTIVITIES

- Earn income from webpages or websites?
- Provide list of Top 5 webpages or websites from where you earn business income
- Provide the % of income generated from internet

AUTOMOBILE EXPENSES

- Total km driven in the year for business or employment, supported by mileage log _____
- Total km driven in the year _____
- For new businesses or new vehicles, make, model and year of vehicle
 - Market value, if owned \$ _____
 - Lease or financing agreement
- Expenses
 - Car washes
 - Gas and oil
 - Insurance, licence and registration
 - Interest paid on money borrowed to purchase automobile
 - Lease payments
 - Parking costs
 - Repairs and maintenance

BUSINESS USE OF HOME

- Area of home used only for business (sq ft) _____
- Total area of home (sq ft) _____
- Expenses
 - Insurance (for self-employed or commission employee only)
 - 100% office maintenance and repairs
 - Other maintenance and repairs
 - Mortgage interest (for self-employed only)
 - Property taxes (for self-employed or commission employee only)
 - Security monitoring fees
 - Utilities

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