	2017 Personal Tax Checkli		
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Chartered Professional Accountants	<u></u>	<u>estiman porta</u>	
Please complete the following checklist and return to	our office with your personal tax information.		
Client: *Address:	Names of spouse and dependents	/ Doto of Pirth	Social Insurance Number
CONFIRM	Names of spouse and dependents		
		//	
*Phone Number:			
*Cell phone Number:		//	
*Work phone Number:		//	
<pre>*email address: or electronic copy</pre>	(please complete enclosed consent for	sending comme	rcial electronic messages)
*Do you want a paper copy or electronic copy	of our tax returns? 1 year? 3 years	;?	
	ed/Common-Law/Separated/Divorced/Widowed ge (if applicable):		nent if applicable)
*Are you registered and do you collect GST from custo	mers? Yes No If yes, are we filing you	ur GST Return?	Yes No
*D'1 11 ' 1 ' 1 ' 20179 V	N		
*Did you sell your principal residence during 2017? Ye	s No		
*Are you a Canadian Citizen Yes No If yes, and citizenship to Elections Canada to update the Nation) give your name	e, address, date of birth,
*Did you own any foreign property with a cost of \$100 (Including cash, stocks, trust, partnerships, real estate, ta			
Income (Include all information slips THAT APPLY TO)	(OU) NOTE: To evoid a failure to report inco	ma nanalty nla	aca cubmit
T4 – Employment income	any additional/late information		
T4A – Pensions and other income	any additional/late information	sups as soon as	possible.
T4E – Employment insurance			
T4PS – Statement of Employee Profit S	haring Plan Allocations and payments		
T4 RSP – RRSP withdrawals			
T4 RIF – RIF payments			
T3 – Trust income (mailed as late as Ma	rch 31)		
T5 – Interest and dividend income			
	2, T101, TL11A, B, C and D, T5003, T5007, T5	008, 15013, 150	018
Business income (statement of income a	1 /	No If,	Una DIN.
	expense) Do you have an AgriInvest PIN? Yes _ d expense and any legal documents on capital pu		yes, PIN:
Capital gains & losses realized (includir		licitases of sales	<i>\$</i>)
Sale of capital property			
Alimony, separation allowances, child m	aintenance		
Interest income received and or earned b			
Deductions (Please provide all receipts) THAT APPLY 1			
	epayment of LLP- lifelong learning plan or HBP	-home buyers' r	ulan)
RRSP withdrawals for LLP- lifelong lea		nome cuyers p	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,
	and signed by employer) (If deducting motor v	ehicle expense	s, please include
Tuition receipts (T2202, TL11A, B, C o			
Interest paid on student loans			
	borrowed to purchase investment, & investment	counsel fees)	
Public transit passes			
	ist of new tools acquired, T2200 signed by employed	oyer and receipt	s signed by employer
Union or professional dues	2 11 - 21		
Charitable donations and/or political con	tributions ctible child support payments paid during the ye	or (const of on-	naw agragment)
Animony, separation allowances of dedu Child care expenses (provide receipts w		a (copy of any	new agreement)
Adoption related expenses			
	access/increase functionality if you are over 65 o	or eligible for the	e disability tax credit.
	school/regulated child care facility by a certified		
	dents (prescription drugs, dental, private health of		
Medical travel – we	orksheet provided)		
Moving expenses – if greater than 40 km	ns for new work or school location		NEXT
Travel in a Prescribed Zone – box 32	on your T4 slip must have \$ amount (complete travel	worksheet) PAGE>

2017 Personal Tax Checklist

Questions:

(1) Who is claiming Northern Residence in your household? ______Basic _____ Additional Or, claim however is most beneficial for tax? Yes ___ No___

Address: _____ Dates lived there: From: _____ To: _____

Proof of residency on file? _____ I.e.) Property tax notice, rent receipts, utility bills, etc.

- (2) Are you or any of your dependents disabled (dependents may include spouses, children, parents, grandparents, grandchild, brother, sister, aunts, uncles, nephews or nieces)? Yes___No___ If yes, Provide Form T2201 disability tax credit certificate and details on how the person is dependent on you.
- (3) Are you the caregiver for any infirm family members? Yes___No___ If yes, please provide details.
- (4) Do you have direct deposit set up with the Canada Revenue Agency? Yes___No___ Not sure? ____ Has your banking information changed in the last year? Yes ____ No ____If yes, please inform our office.
- (5) First time homebuyer's tax credit: Did you purchase your first home in 2017? Yes___No___ If yes, please provide details.
- (6) Have you spent more than 200 hours acting as a volunteer firefighter or a search and rescue volunteer? Yes___No___ If yes, provide a letter from the municipality.
- (7) Are you a U.S. citizen, Green Card Holder, or were you, or your parents born in the United States Yes___No___ If yes, you likely have U.S. filing obligations.
- (8) Have you spent time in the U.S. in the last 3 years (2017, 2016 and 2015)? Yes___ No___ If yes, you may have to fill out and file a Form 8840 Closer Connection Exception Statement for Aliens to establish whether you are a U.S. Resident for tax filing purposes.
- (9) Do you earn any of your income from a website(s)? Yes___No___ If yes, please provide website address(es):
- (10) Did you have any children in college/university during the year? Yes____No____ Are you claiming any of the tuition? Yes____No____ Are we preparing their tax return Yes____No____
- (11) If you were between the ages of 65-70 during the year and have self-employment earnings, do you wish to elect to stop contributing to the Canada Pension Plan (CPP)? Yes _____ No ____ N/A _____
- (12) What else do you think we need to know to prepare your tax return?