SMITH | SYKES | LEEPER | TUNSTALL LLP
CHARTERED PROFESSIONAL ACCOUNTANTS

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660 Bayview Drive, Unit 2A
Barrie, ON L4N 9P5
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ENABLING PEOPLE TO MAKE WISE FINANCIAL DECISIONS.

2017 PERSONAL TAX CHECKLIST

Join us on Twitter and Facebook for tax tips, news and advice, @sslgroupCPAs

Return this completed form with all relevant documentation to our office no later than **April 16th, 2018**, to ensure we can **E-File your return by 5:00 p.m. on April 30th, 2018**. It is imperative that you sign and return your E-File Authorization Form by April 30th, 2018.

Name: ____________________ Date of birth: ____________
Address: ____________________ Marital status: ____________
____________________ SIN: ____________
Home phone: ____________ Cell: ____________ Work phone: ____________
Email: ____________________ Ext: ______

Please enclose all slips receipts and supporting documentation (summarized receipts are best),

NEW CLIENTS – Please provide us with the last tax return you filed

Attach this checklist to your submission

Did you sell your principal residence? If yes, we need the year of acquisition, sale proceeds and address,	☐Yes	☐No
Provide information to Elections Canada?	☐Yes	☐No
Were you born in the USA, or are you a US citizen / Green Card holder?	☐Yes	☐No
Did you own foreign stocks or property with a cost greater than $100,000 at any time during the year?	☐Yes	☐No
Have you registered for Canada Revenue Agency's online mail program?	☐Yes	☐No

DEPENDANT INFORMATION

Name(s)	Date(s) of Birth	SIN	Income

Save Time!

EMAIL your tax information to our client administrator:

In Newmarket: Cynthia Wedge cynthia.wedge@sslgroup.ca

In Barrie: Anne Ffrench anne.ffrench@sslgroup.ca

EMPLOYMENT INCOME AND DEDUCTIONS

Employment income - *provide T4* ☐

Commission, other employment income - *provide T4A* ☐

Employment insurance & other benefits - *provide T4E* ☐

Employment expenses - *provide signed T2200* ☐

Annual union / prof. dues - *provide summarized receipts* ☐

Moving expenses related to employment - *call us!* ☐

Access worksheets for employment expenses on our Forms page at www.sslgroup.ca/forms

- Or -

Employment Expenses Worksheet **Allowable Vehicle Expense Worksheet** **Home Office Expense Worksheet**

RETIREMENT INCOME AND DEDUCTIONS

Pensions and annuities - *provide T4A* ☐

Old Age Security pension - *provide T4A(OAS)* ☐

Canada Pension Plan benefits - *provide T4A(P)* ☐

Registered Retirement Income Fund - *provide T4RIF* ☐

Foreign pension income ☐

RRSP withdrawals - *provide T4RSP* ☐

RRSP contribution slips - *up to March 1st, 2018* ☐

Split pension income with your spouse ☐

INVESTMENT INCOME AND DEDUCTIONS

Mutual fund and trust income - *provide T3* ☐

Interest, dividend and other income - *provide T5* ☐

Partnership income - *provide T5013* ☐

Securities transactions statements - *provide T5008* ☐

Other / foreign income, i.e. U.S. income slips ☐

Gains and losses from the sale of investments - *provide:* ☐

- Monthly investment statements
- Annual trading summary
- Details of original cost when purchased (price and date)

Interest expense and investment management fees ☐

If you sold property other than your principal residence, i.e. cottage, rental or other investment property – *contact us for details*

OTHER SOURCES OF INCOME AND DEDUCTIONS

Rental income and expenses ☐

Self-employment income and expenses ☐

(between ages 65 & 70? Elect to stop CPP contributions? ☐ Yes ☐ No*)*

Child care expenses - *provide invoices or name and SIN of caregiver* ☐

Received or paid child and/or spousal support – *provide amounts, name and SIN of recipient* ☐

Access worksheets for self-employment & rental income/expense on our Forms page, at www.sslgroup.ca/forms

- Or -

Business Income & Expense Worksheet **Allowable Vehicle Expense Worksheet** **Home Office Expense Worksheet** **Rental Income/Expense**

TAX CREDITS

Medical expenses, *(have your pharmacy print an annual summary of prescriptions)* ☐

Health and travel insurance premiums ☐

Nursing / retirement home annual invoice ☐

Donations ☐

Tuition - *provide T2202A (signed if parent is claiming)* ☐

Student loan interest ☐

Disability - *provide T2201 certificate* ☐

Property tax and rent paid - *provide receipts* ☐

First-time home buyer ☐

Public transit passes ☐

Home accessibility reno costs (Seniors / disability) ☐

Teacher / ECE expenses ☐