

Please use the checklist below to assist in determining items that we will require to complete your 2017 income tax return.

For All Returns

- 2016 notice of assessment
- Other year re-assessments (if any).
- Note changes to personal status on the reverse of this checklist – such as marriage, separation, births, new address, phone number, disabilities, bank accounts for direct deposit, deaths, bankruptcy etc.
- Income taxes paid by instalments

- Senior's Ontario Property Tax payment notice
- Did you receive the Universal Child Care Benefit? (RC62)
- Receipts for public transit passes
- Details of purchase of tools for your job
- T4A(P) – Canada Pension Plan benefits
- US Social Security
- Pension income – foreign and domestic
- T4 RIF – Registered Income Fund
- T4 (employment); T4A (commissions and self-employment); T4E (employment insurance benefits)
- T4OAS – Old Age Security
- T5 – Investment Income
- T3 – Income from Trusts
- T5007 – Workers' compensation / social assistance payments
- T5013 – Partnership income
- Documents relating to purchase or sale of investments and / or real estate, including details relating to shares donated to charities
- T4RSP – Retirement savings plan income
- RRSP contribution slips
- RRSP homebuyer and education withdrawal information
- Medical, dental, nursing home and other private medical insurance receipts, including out of country travel insurance costs
- Charitable donation receipts
- T2202A – Tuition fees and education amounts
- Interest paid on qualified student loans
- Professional or union dues paid
- Details of foreign property (land, buildings, shares)
- Details of any foreign income
- Carrying charges and loan interest to earn income
- Professional consultants' fees
- Spousal support income or payments
- Separation – copy of agreement and details
- Details of Home Accessibility expenses for qualifying individuals
- Eligible educator expenses. Provide receipts & written certificate from employer or delegated official

- Did you sell your home? We need the year of purchase, proceeds of disposition and address.
- Details of people you support, and their medical status
- Child Care information – receipts and dates of camps attended
- Receipts applicable for Children's Fitness credit and the Ontario Children's Activity credit
- Property taxes and / or rent paid and to whom
- Moving expenses
- Political contribution receipts
- T2201 – Disability tax credit claim form
- Details of all investments
- Legal fees incurred to earn income
- T2200 or TL2 from employer (declaration of conditions of employment)
- Employment Expenses
- Total kilometres driven and vehicle driving log
- Details of apprentice vehicle mechanic tool costs in year

Rental Property

- Address and number of units
- Rent per unit
- Any other money received
- Mortgage interest
- Utilities
- Property taxes
- Repairs and maintenance
- Renovation costs
- Insurance
- Other rental expenses
- Partners' names, addresses and SINs

Business / Self Employed / Commission Income

- Revenue and Expenses for the year
- Asset additions
- Advertising and promotion
- Home office expenses, including property taxes, insurance, mortgage interest, utilities and repairs
- Percentage of home used as an office
- Personal vehicle expenses – gas, repairs, insurance, parking, car washes, leasing or original cost, and kilometres travelled for business purposes, and total kilometres travelled for the year
- Apprentice vehicle mechanic tool costs
- T2200 from employer (declaration of conditions of employment)
- TL2 (for individuals in transportation industry)
- GST/HST Remittance form and access code