TOM WILHELM PROFESSIONAL CORPORATION
Chartered Professional Accountants

Personal Tax Return Checklist

The following information, where applicable, will be required in order to complete your personal tax return. Please review this list and check any items that apply to you. When you have received all the necessary documents, please assemble the documents and bring them to our office along with a copy of this checklist.

Name: ____ Phone Number:
Email: ____ Preferred Method of Communication phone □ email □

(Y/N)

(Y/N)			
______	Address and phone # same as last year?		(if no, please provide details, consider moving expenses
______	Marital status same as last year?		(if no, please provide details)
______	Children born/adopted during the year?		(if yes, please provide details)
______	Are we preparing your spouse/children's return?		(if yes, please provide details of their income)
______	Did you use direct deposit last year?		
	- If yes, has your bank account changed?	□	(if yes, attach new void cheque)
	- If no, would you like to use it this year?	□	(is yes, attach void cheque)
______	Do you currently work with a financial planner?		

Please check the following, if applicable:
Government forms:

□ T4 - for wages or salary
□ T4A - pension income
□ T4A(OAS) - Old Age Security
□ T4A(P) - Canada Pension Benefit
□ T4E - for employment insurance income
□ T4RSP - for RRSP income
□ T3 - for investment/trust income
□ T5 - for investment income
□ T5007 - for workers' compensation and social assistance payments
□ T5008 - if you own and have bought/sold securities
□ T5013 - for partnership income
□ T5003, T5004, T5006 - for tax shelter information
□ T215 - Past Service Pension Adjustment
□ Tax instalment notices showing instalments paid
□ Notices of Assessment for prior year's return

Other receipts, expenses we require, and credits that may apply:

□ First time home buyers may be eligible for Home Buyer's Tax Credit
□ Charitable donations in the year and prior year unclaimed donations
□ Receipts for contributions to Federal or Provincial political parties
□ T2201 - Disability Tax Credit Certificate
□ T2022A slips for tuition credits (yours or dependants)
□ Interest paid on student loans
□ Details of alimony/maintenance paid or received during the year
□ Details of any other income or expenses
□ Medical expense receipts for yourself and dependents
- for numerous drug receipts an annual summary from your pharmacy would be appreciated
- please include details of any out of town travel for medical reasons
- Statement of premiums for extended medical coverage (including medical travel insurance)
□ List of moving expenses if new residence is > 40km closer to a new work location
□ Child care expenses including name, address, and S.I.N of caregivers
- daycare, camps
□ Public transit passes (monthly or annual passes)
- for all taxpayers to July 1st, 2017
- for seniors July 1st to Dec 31, 2017
□ Property tax statements or rent receipts for rent paid in the year

Other information:

□ TL2 - for transport drivers (for meals & showers)
□ T2200 - for salesperson's expense and tradesperson's tools
□ RRSP contribution
□ Did you withdraw funds from your RRSP ?
- under the HomeBuyer's Plan
- the Lifelong Learning Plan
□ Details of disposition of capital property not noted above (gains/loss report) during the year (eg: stocks, bonds, real estate, mutual funds
□ Details of rental or business income and expenses
□ Union & professional dues receipts
□ Details of expenses relating to any commission income earned

- ◻ Receipts showing interest paid on money borrowed to earn investment income
- ◻ Did you spend more than 183 days outside of or Canada in the calendar year? (if yes, please provide details)
- ◻ Details of foreign investments (if aggregate cost is greater than CDN $100,000) and income, including from foreign trusts and foreign partnerships
- ◻ Do you have living with you: a parent or grandparent, or an infirm child or relative over the age of 18?
  - You may be eligible for certain credits. Please provide us with details. (Call us to discuss)
- ◻ If you sold your principal residence during the year, please contact our office for details to be reported.

Taxpayer's legal representative

◻ If you have the power of attorney for an individual or are the executor of an estate you MUST provide legal documentation from your lawyer as verification in order for the tax return to be processed.

Please provide the name of the individual acting on behalf of the taxpayer:

First Name: ___________________________________

Last Name: ___________________________________

Title: _______________________________________