



Personal Tax Checklist

First & Last Name: _____

Sign Me up for the Newsletter

Email Address: _____

Are you a Canadian Citizen?

Did you arrive in Canada this past year?

Date Arrived: _____

Province of residence on December 31st:

Full Mailing Address: _____

Please include apt#, city, province, and postal code

Phone: _____ Date of Birth (MM/DD/YYYY): _____

S.I.N: _____ Marital Status: _____

Spouse's Information (If applicable)

First & Last Name: _____ S.I.N: _____

Are you a Canadian Citizen? Date of birth (MM/DD/YYYY): _____

Dependants

First & Last Name	Date of birth (MM/DD/YYYY)	S.I.N (if applicable)	Net Income (if applicable)

TAX SLIP CHECKLIST – CHECK ALL THAT APPLY

Personal Income

- T4, T4A – Salaries, Employment, Pension
- Other Employment Benefits
- T4A (P) – CPP Benefits
- T4 (OAS) – Old Age Security Benefits
- T4RIF – RRIF Income
- T4E – Employment Insurance Benefits
- T5007 – Social Services Benefits
- T11137 – Statement of Account – Home Buyer's Plan
- T4RCA – Retirement Income
- RC62 – Universal Child Care Benefit

Investment Income

- T3, T5, T4PS – Interest and Dividends
- T5008 – Statement of Security Transactions
 - Interest on 2015 Tax Refund
- T6000 – Canada Savings Bonds
- T3 – Income from Mutual Funds
 - Rental Income *
- T5013 – Net Partnership Income (Loss)
 - Capital Gain/Losses *



Other Income

- Alimony Received
- Scholarship/Bursaries
- Professional Earnings

Business

- Employment Earnings *
- T5018 – Statement of Contract Payments
- Other – Specify

Other Deductions

- RRSP Receipts
- Union, Professional Dues
- Alimony Paid
- Attendant Care Expenses
- Interest Carrying Charges on Investments
- Investment Counsel/Accounting Fees
- Employment Expenses *
- E.I. Repaid
- Deductible Legal Fees

Non-Refundable Credits

- Married Amount – Spouse Net Income \$ _____
- Equivalent to Married Amount
- Disability Deductions*
- T2202 – Tuition Fees/Education Credit
- T2202 – Tuition Fees/Education Credit for dependent
 - Dependent’s Net Income \$ _____
- Interest Paid on Student Loans
- Medical Receipts
- Charitable Donations
- Dependent Data (For GST Credit and Child Tax Benefit)
- Family Caregiver (supported a dependant with physical or mental impairment)

- T2200 Declaration of Condition of Employment *
- TL2 – Claim for Board & Lodging Expenses
- Moving Expenses *
- Allowable Business Investment Loss
 - Capital Losses Carry Forward
 - Non-Capital Losses Carry Forward
- Limited Partnership Losses of Other Years

OTHER INFORMATION

- 2015 Notice of Assessment
- Details on Foreign Property held in 2016 where total cost exceeded \$100,000 Canadian
This includes foreign shares held in Canadian trading accounts
- Sale of principal residence in 2016 *
- Summary of 2016 Installment Payments

* FULL DETAILS WILL BE REQUIRED FOR THESE ITEMS. SELF EMPLOYED INDIVIDUALS PLEASE ALSO COMPLETE THE FORM FOUND [HERE](#).

Child Fitness - Total: _____ Child Arts - Total: _____ Childcare Expenses - Total: _____
Name of daycare or name and SIN of individual: _____
Total transit passes (weekly, monthly, Presto): _____ Total donations: _____

When finished, please save this form to your computer, and attach it [HERE](#), along with all relevant tax slips and documentation (e.g. receipts). Any questions please contact us via e-mail: info@khfinancial.ca

THANK-YOU!