

## 2016 Personal Tax Checklist

### Personal Information

#### You

Name: \_\_\_\_\_  
 Phone/Fax: \_\_\_\_\_  
 Email: \_\_\_\_\_  
 SIN: \_\_\_\_ - \_\_\_\_ - \_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_  
 Postal Code: \_\_\_\_\_  
 Birth date(MM/DD/YEAR): \_\_\_\_/\_\_\_\_/\_\_\_\_  
 Marital Status: \_\_\_\_\_

#### Spouse

Name: \_\_\_\_\_  
 Phone/Fax: \_\_\_\_\_  
 Email: \_\_\_\_\_  
 SIN: \_\_\_\_ - \_\_\_\_ - \_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_  
 Postal Code: \_\_\_\_\_  
 Birth date(MM/DD/YEAR): \_\_\_\_/\_\_\_\_/\_\_\_\_

### Dependant Information

(Please include children born in 2016)

	1	2	3
Name	_____	_____	_____
Birth Date	_____	_____	_____
Relationship	_____	_____	_____
SIN #	_____	_____	_____
Net Income	_____	_____	_____

Please submit information for additional dependants on a separate sheet.

1. Did your marital status change during the year: no / yes **(circle one)** If yes, indicate date of change MM/DD/2016

2. If you are married or living common-law and we are not preparing your spouse's return, please provide the following:

Name: \_\_\_\_\_ SIN #: \_\_\_\_\_ Net Income: \_\_\_\_\_

3. Did you receive the Canada Child Tax Benefit (CCTB) for any of your children in the current taxation year?

no / yes **(circle one)**

4. Did you pay childcare expenses in the current taxation year? no / yes **(circle one)** If yes, please attach receipts.

5. Did you own foreign property at any time in the current taxation year with a total cost of more than \$100,000 CAD?

no / yes **(circle one)** If yes, please attach details.

6. Do you authorize Canada Revenue Agency to provide your name, address, and date of birth to Elections Canada for the National Register of Electors? no / yes **(circle one)**

8. Do you want to start or change Direct Deposit of refunds into your bank account? This includes income tax refunds, GST/HST Credits, Canada Child Tax Benefits, or Universal Child Tax Benefits.

If yes, please include a voice cheque.

\*\*\*\*Please attach your 2015 Assessment Notice\*\*\*\*

## Supporting Documents

Read through the following list and check all that apply to you (and your spouse, if applicable).  
 Attach the corresponding documents.

### Income Items

- T4 - Statement of Remuneration Paid
- T4A - Pension, Annuity and Other
- T4A(OAS) - Old Age Security
- T4A(P) - Canada Pension Plan
- T4E - Employment Insurance
- T4RSP - RRSP Income
- T4RIF - RRIF Income
- T3 - Trust Income Allocation
- T5 - Investment Income
- T5008 - Securities Transactions
- T5013 - Partnership Income
- Foreign Pensions or US Social Security
- Any other tax slips or income received

### Deductible Items

- Public Transit Passes - attach receipts
- Children's Fitness Credit Receipts
- RRSP Contribution Receipts
- Charitable Donation Receipts
- Medical Expenses Receipts
- Investment Expenses / Carrying Charges
- Tradesperson Tools and Expenses
- Tuition Fees of more than \$100 - T2202A
- Student Loan Interest Forms
- Moving Expense Receipts
- Union / Professional Dues
- Employment Expenses - T2200 Required

### Other Documents

- Details of assets sold during the year - stocks, bonds, real estate, equipment, autos  
 (including details of the sale of your principle residence)
- Income and expenses from rentals, business or partnership
- Contributions to federal and provincial political parties
- Details on alimony/maintenance received or paid
- Assessment notices and correspondence from Canada Revenue Agency
- Receipts for tax paid by installments

Thank you for completing the Security House Accounting Inc. 2016 Personal Tax Checklist. Please sign below and bring this and all supporting documents to our office to have your 2016 personal income tax return prepared.

I authorize Security House Accounting Inc. to prepare my 2016 Income Tax Return, as well as those listed as Spouse and/or dependents, if applicable.

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 Name

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 Signature

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 Date

**Between March 1, 2017 and April 30, 2017, our office hours are:  
 Monday to Friday 8:30am to 5pm, Saturday 9am to 4pm (Hillside Only)**