

# 2017

Use the **CHECKLIST** below to help you in preparation of your **2017 Personal Income Tax**.

Go to [daviescpa.com](http://daviescpa.com) for our **SECURE PORTAL LINK**

Please ensure that you have collected all your tax information before you upload to the portal or drop off your information to our office.

Provide your information **NO LATER THAN APRIL 13<sup>th</sup>**

Call us with any questions or concerns at **613-389-8177**.



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From questions to clarity – we understand the heart of your business.

### Personal Information

Details of any changes in personal information/family situation in 2017 (eg. New children, change in marital status, address change, adoption costs etc.).

### Sources of Income

Employment, Pension & Investment Income  
Including T4, T4E, T4OAS, T4A(P), T4A, T5, T3, T4RSP, T4RIF

**Note:** For investments, please provide us with the complete tax package from your investment advisor. Tax receipts (T3) from mutual funds, exchange traded funds and other trusts are not required to be mailed out until March 31, 2018 which means they will not be received by you until the first week of April.

### Business, Professional and/or Rental Income

Summarize income and expenses, including office in home expenses, summary of car expenses, kilometers driven and business portion, if applicable.

### Types of Deductions/Credits

Receipts for Professional Dues, Charitable Donations, and Medical bills - Don't forget to include receipts for premiums to medical insurance plans. Request annual summary from pharmacy, chiropractor, physiotherapist etc.

### Receipts for Child Care Expenses

Receipts must include name of child, as well as SIN #, address and signature of caregiver.

### RRSP Receipts

### Employment Expenses

Summarize car expenses, number of kilometers driven and business portion. If you are an employee, you need a signed T2200 from your employer to claim these expenses

### Tuition, Student Loan Interest, Rent

Form T2202 for tuition must be signed by the student if transferring to parent. Rental receipts or letter from landlord showing the amount of rent paid for 2017 and address of rental unit are required.

### Details of any Dispositions of Capital Property

(eg. Stocks, mutual funds, real estate) in 2017 including original cost and proceeds. This year-end transactions report from the investment advisor/fund company is required.

### Other

#### Sale of your Principal Residence

Please provide us with the date of acquisition, the sale price, and the municipal address of the property.

Did you own or hold foreign property (investment/real estate) at any time in 2017 with a total cost of more than CAN \$100,000? If unsure, please call us for further information.  Yes  No