



2016 PERSONAL INCOME TAX CHECKLIST

SIMPLIFIED

YBL has put this checklist together to ease the tension you feel during tax time. We kindly ask that you read to the end as we've crafted this checklist to answer a lot of questions you/we may have. We are also making an effort to make our office a PAPERLESS one so please feel free to scan or take a picture with your phone and email over your tax information

NEW CRA CHANGES!

- **IF YOU MOVED!** You must report the sale of your home on your tax return.
- **Children's Fitness & Arts** – Now \$500 and \$250 respectively. Both gone in 2017.
- **Home accessibility expenses** – You can claim a max. of \$10,000 for eligible expenses.
- **Educator supply credit** – Teachers can claim up to \$1,000 of eligible supplies expenses.
- **Family tax cut** – Eliminated in 2016.

<p style="text-align: center;">To help us get started</p> <ul style="list-style-type: none"> <input type="checkbox"/> Your full contact information <input type="checkbox"/> T1013 Authorizing and Cancelling a Representative (we provide) <input type="checkbox"/> A confidential email address <input type="checkbox"/> NEW CLIENTS – A copy of your previous year's tax return & NOA <input type="checkbox"/> CURRENT CLIENTS – Any CRA correspondence during the year 	<p style="text-align: center;">Personal</p> <ul style="list-style-type: none"> <input type="checkbox"/> SIN & DOB for all <input type="checkbox"/> Child Fitness & Arts <input type="checkbox"/> Children & Adoption <p>PLEASE inform us of changes</p>
<p style="text-align: center;">Receipts</p> <ul style="list-style-type: none"> <input type="checkbox"/> Childcare expenses <input type="checkbox"/> Child Fitness & Arts <input type="checkbox"/> Adoption expenses <input type="checkbox"/> Donations (and political contributions) <input type="checkbox"/> Medical expenses <input type="checkbox"/> Public Transit expenses <input type="checkbox"/> Tuition (T2202A & TL11A) <input type="checkbox"/> Apprentice with tool receipts* <input type="checkbox"/> Capital Gains/losses* <input type="checkbox"/> Disability tax credit (T2201) <p>★ Ask us for a template to help you track your receipts!</p>	<p style="text-align: center;">Other Slips/Forms</p> <ul style="list-style-type: none"> <input type="checkbox"/> RRSP & RESP <input type="checkbox"/> Student loan & interest <input type="checkbox"/> T2200 Conditions of Employment <input type="checkbox"/> Tool Expenses <input type="checkbox"/> Union & Professional dues <input type="checkbox"/> Child support payments <input type="checkbox"/> Moving expenses <input type="checkbox"/> Volunteer Firefighters <input type="checkbox"/> Alimony payments <input type="checkbox"/> Home Buyers' Plan & LLP <input type="checkbox"/> Legal fees incurred to obtain or enforce spousal/child support
<p style="text-align: center;">Income Slips</p> <ul style="list-style-type: none"> <input type="checkbox"/> T4/T3/T5 <input type="checkbox"/> T4A - Pensions & Annuities <input type="checkbox"/> T4AOAS - Old Age Security <input type="checkbox"/> T4AP - CPP Benefits <input type="checkbox"/> T4E - EI & Other Benefits <input type="checkbox"/> RC62 - UCCB <p>★ Let us know if you earned income outside of Canada</p>	<p style="text-align: center;">Ask us about our detailed checklist with more business information and our business templates!</p>