



**2016 INCOME TAX RETURN CHECKLIST**  
 (Please complete and return with relevant information)

Please use this checklist to help organize all the items required to complete your tax return. Please check off appropriate boxes. Please be sure to advise us of any changes in address or marital status.  
 If you, or a family member, have become disabled during the year you may be eligible for an additional tax credit.

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Children \_\_\_\_\_

Phone: \_\_\_\_\_ (during day)                      \_\_\_\_\_ (home)                      \_\_\_\_\_ (cell phone)

Email: \_\_\_\_\_

**PLEASE NOTE:**                      **Canada Revenue Agency (CRA) requires that if you owned foreign income producing property with a cost of more than \$100,000 (Cdn) at any time during 2016 you must provide certain information on your tax return. Please advise us if this applies to you.**

	'X'	Additional information
<b>INCOME:</b>		
Employment: (T4, T4A)	<input type="checkbox"/>	_____
Investment/interest/dividends: (T3, T5, T5013)	<input type="checkbox"/>	_____
Universal Child Care Benefit	<input type="checkbox"/>	_____
Pensions:            RRSP/RRIF/Annuities                      T4RSP, T4RIF, T4A	<input type="checkbox"/>	_____
Canada Pension                                      T4A(P)	<input type="checkbox"/>	_____
Old Age Security                                      T4OAS	<input type="checkbox"/>	_____
Employer    T4A	<input type="checkbox"/>	_____
Foreign sources	<input type="checkbox"/>	_____
Business (please complete schedule which can be found at <a href="http://www.blrca.ca">www.blrca.ca</a> ):	<input type="checkbox"/>	_____
Rental property (please complete schedule which can be found at <a href="http://www.blrca.ca">www.blrca.ca</a> ):	<input type="checkbox"/>	_____
Capital gains/losses	<input type="checkbox"/>	_____
- Sale of investments - provide information on original cost, proceeds, expenses, dates	<input type="checkbox"/>	_____
- Broker statements or summaries would be very helpful	<input type="checkbox"/>	_____
- Annual statements from Mutual Fund companies	<input type="checkbox"/>	_____
Other income (please provide details on separate page):	<input type="checkbox"/>	_____
- Spousal support	<input type="checkbox"/>	_____
- Lump sum pensions	<input type="checkbox"/>	_____
- Other sources of income for which no slips were received.	<input type="checkbox"/>	_____

**CHECKLIST CONTINUED:**

**Additional information**

'X'

**DEDUCTIONS**

RRSP contributions: receipts required

\_\_\_\_\_

Union or professional dues: (if not included on your T4)

\_\_\_\_\_

Child care: Please provide name, address and SIN if applicable  
If your child attended an overnight camp please provide the number of weeks at camp.

\_\_\_\_\_

Carrying charges: interest  
management fees

  

\_\_\_\_\_  
\_\_\_\_\_

Employment/commission expenses (complete employment expense schedule (www.blrca.ca) and include T2200 from your employer)

\_\_\_\_\_

Spousal and child support payments (please provide breakdown)  
Moving expenses (please contact us)

  

\_\_\_\_\_  
\_\_\_\_\_

**NON-REFUNDABLE TAX CREDIT INFORMATION**

Tuition fees and Education amount for self or dependants

- please have dependants sign back of T2202A

\_\_\_\_\_

Medical expenses paid, including health insurance premiums

- please enclose all receipts

**- for prescriptions please consider obtaining a summary from your pharmacy. All pages are required**

\_\_\_\_\_

Passes for public transit must show users name and proof of amount paid

Child fitness and activity receipts for children under 16 during the year

First-time home buyers' credit (include agreement of purchase and sale)

Charitable donations (include receipts)

Political donations (include receipts)

Interest paid on student loans (official statement required)

  
  
  
  
  

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**PROVINCIAL TAX CREDIT INFORMATION**

Rent or property tax paid on principal residence  
(obtain and include receipts displaying address and landlord's name if you rent)  
(provide copy of final property tax bill if you own)

\_\_\_\_\_

**INCOME TAX INSTALMENTS MADE DURING THE YEAR**

\_\_\_\_\_

Are you a U.S. citizen, a U.S. green card holder or were you born in the U.S.? Yes

No

CRA, in conjunction with Elections Canada, is once again asking whether or not you will give your consent to provide Elections Canada with your name, address and date of birth only.

I am a citizen of Canada Yes

No

The purpose of this is to keep the National Register of Electors up to date for future elections. Would you please indicate your decision on this matter below.

Yes, consent given

No, consent denied