Gregory, Harriman & Associates LLP Personal Tax Checklist 2016

Please ensure all 3 pages have been reviewed

(One form per couple/Children over 18 complete their own)

Our Personal Tax Checklist is designed to help you make this process as easy and efficient as possible. It also assists us, your accountants in ensuring that we are as complete and accurate as possible. Please review the checklist and put together the relevant slips and information. You can attach the slips and send in a hardcopy or scan the information and email to us at <a href="mailto:mai

Personal Tax Returns will <u>NOT</u> be efiled without payment and required signatures.

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How do you want your prepared Personal Tax Return for 2016 returned to you?							
Pick up at GH&A Send by Express Post (cost of \$40.00) Email with password - email address							
PERSONAL & FAMILY INFORMATION							
Name: Spouse:							
If you have moved in 2016/2017 please provide new address:							
Have you sold a real estate property in 2016? (including principal residence) Yes No							
If yes, what were the gross sale proceeds?I			Date of Purchase?				
Marital Status:	Married Widowe	ed Divorced	☐ Common-law ☐ Separated ☐ Single				
If Marital status has changed during the year, provide date of change (YY-MM-DD):							
If we are not preparing your spouse's return, provide his/hers net income:(from line 236)							
List any Dependents who were born/adopted in 2016:							
Name	Date o	of Birth	Son/daughter				
Should any of your dependents who are not filing income tax returns earn income; please provide a summary of their earnings to us. Yes N/A							
Do you, your spouse or any of your dependents qualify for the Disability Tax Credit? Yes No							
INFORMATION SLIPS – Ensure all T-Slips are provided							
Employment and Other Ir	ncome - T4, T4A		Government – (T4A, T4, T4(P), T4E), T4,(OAS), RC62, T5007)				
Do you have any Tips & G	iratuities to report? \$	S	Investment/Interest (T5, T3, T5013 partnership income, T101)				
Pension Retirement (T4RS	SP, T4RIF)		Foreign Slips – Investment/Employment/Pension				
Do you expect to receive any additional slips? Yes 🗌 No 🔲 - If yes, please provide as soon as you receive them							
SELF-EMPLOYMENT INCOME (FARMING/BUSINESS/PROFESSIONAL/RENTAL) go to page 3 or to www.gh-a.com Farming Reminder Checklist Business/Professional Income Checklist Rental Income Checklist GST Filing							
INVESTMENTS N/A							
☐ Trading Summaries from Broker for realized gains/losses ☐ Interest paid on investment loans							
☐ Investment Counseling/Management fees ☐ Income/Gains/Losses for Securities held outside brokerage							
Can we contact your investment advisor: Yes No * If yes, please provide advisor's information:							
Name :	phone nun	nber:	email:				

DEDUCTIONS AND CREDITS - IF APPLICABLE <u>ALL RECEIPTS/SLIPS</u> MUST BE PROVIDED								
RRSP Contributions up to March 1, 2017		Union and Professional Dues						
Public Transit		Donations (charitable/political)						
Home Accessibility Tax Credit (over 65 years or disabled)								
Tuition Slip & Exam fees (T2202 – outside of Canada TL11A) – If the credit is to be transferred advise: spouse parent grandparent								
Student Loan Interest		Child Care (including day/summer camps)						
Children's Fitness Credit (Limit decreased - \$500/child)		Children's Arts Credit (\$250/child)						
Alimony/Maintenance-Exclude Child Support		Family Caregiver Amount						
First Time Home Buyers Credit		Volunteer Firefighter Credit (over 300 hours)						
Medical Expenses (see below checklist)		Educator School Supply Credit						
Moving Expenses – Employment/Business/ Students (GH&A will need to determine if you are eligible)								
Employment Expenses (a signed T2200 must be provided)-GH&A LLP will need to review to advise what is available for deductions								
Medical Expense Checklist								
Private Health Care Costs/Attendant Care & Gro	up H	ome (attach receipts)						
Other Dental & Medical (receipts of health plan	expe	ense coverages)						
Travel Costs (if over 40 km one way) – provide li	sting	of trips, dates and mileage						
Meals (if travel over 80 km one way) – provide l	isting	g of trips, dates and mileage						
Prescriptions – (detailed listing from pharmacy	nclu	ding RX#, Drug Name, DIN #, & Doctor's Name)						
	ww.	.gh-a.com for listing of eligible medical expenses and authorized medical						
practitioners								
	ОТНЕ	ER IMPORTANT MATTERS						
Do you authorize CRA to provide information to Elections Canada: (Information to be provided : date of birth, address and citizenship)								
Are you a Canadian citizen?: Is your spouse a Canadian citizen?: If no, please state what other citizenship you/spouse hold:								
Have you spent more than 120 days in the United States in any of the last 3 years? If yes, please provide the number of days per calendar year : 2016 2015 2014 GHA LLP to prepare IRS form 8840 if required Client will be filling out their own 8840 form								
Do you and/or spouse own/hold foreign property/securities for the purpose of generating income with a total cost of more than a \$100,000 Canadian total? YES * NO (does not include RRSP assets) * (If yes, form T1135 will be required at an additional cost)								
CONSENT TO USE PERSONAL AND/OR FINANCIAL INFORMATION								
your personal tax return for the year 2016 Your personal and financial information may include, but not limited to, your your dependents, current employment status, name of your employer, e	r name, employe	ial information to their employees in accordance with their Privacy Policy for employees to prepare and comp , home address, home telephone number, date of birth, social insurance number, name of your spouse, namer's address, employer's telephone number, employment income information, business income information that Gregory, Harriman & Associates LLP, may require to complete your personal tax return.	ne of					
□ YES □ NO								
Gregory, Harriman & Associates LLP is authorized to retain the current personal and/or financial information and historical personal and/or financial information for as long as it may be required by legislation, i.e. the Income Tax Act, and/or as may be required to document future support program applications and/or future external financing applications and doing so thereafter for a reasonable period of time. I acknowledge my right to access the applicable personal and financial information collected by Gregory, Harriman & Associates LLP by contacting the Privacy Officer.								
Date: Client Signature								
Date: Client Signature								

SELF EMPLOYMENT DATA							
If you are providing data: Quickbooks/Simply/Sage/AgExpert we will need the following:							
Version:	Vear:	Login: PW:					
In Home Office	Expenses Worksheet 2016	provided on our website: www.gh-a.com					
GST RETURN – DO YOU WANT GH&A TO PREPARE FOR 2016? YES * NO							
(provide the forms and remittance form for payment if amount owing) * If yes and this is the first time GH&A will be preparing your GST return, the RC59 must be printed off our							
website www.gh-a.com, signed and provided with your information.							
Are you an annual or quarter	☐ Annual ☐ Quarterly						
Farming – Checklist							
Land Sale/Purchase (all documentati		Equipment Sales/Purchase (receipts/invoices)					
Loan Documentation (agreements/s	chedules)	Agr 1 slips					
Grain Advance Documentation		Feeder Loan Cards					
New Surface/Pipeline Agreements summaries)	(receipts/compensations	See Business/Professional Checklist below for common					
summunesy		expenses					
☐Business/Professional/Farm	- Self Employment Incom	e Checklist 🗌 - all information provided in data					
☐ Income \$	(if not provide	ed in data)					
Advertising	Interest/Bank charge	s Supplies					
☐ Insurance	Office Supplies	Utilities					
☐ Meals/Entertainment	Rent	☐ Management/Administration					
Legal/Accounting	Cell Phone	Travel					
☐ Telephone/Gas	Capital Asset Purchas	es Property Taxes					
Salaries	Repairs & Maintenan	ce Business Taxes, Licenses, Dues, Membership fees					
Automobile (see Automobile Expense	es checklist below)	Home Office (go to In Home Office Link @ www.gh-a.com)					
Should you earn income from a we	ebsite, CRA requires disclosure.	web address:					
☐Rental- Self Employment Inco	ome Checklist 🔲 - all infor	mation provided in data					
Rent collected \$		provided in data)					
Advertising	Utilities	Management/Administration					
Insurance	☐ Mortgage Interest	Major Renovations & Purchases					
Condo Fees	Office Supplies	Cell phone					
Legal/accounting	Property Taxes	Repairs & Maintenance					
Travel/vehicle expenses for	Sale /Purchase of Rental Property (provide Statement of adjustments for purchase and sale/legal						
property management							
Automobile Expense Checklis		pt a log of KM driven during the year)					
Total KMs driven in the year for: Busin	1 -						
Fuel and oil		License and Registration Interest on Vehicle Loan Parking Fees Insurance Leasing Costs					
Repairs and Maintenance		· —					
If vehicle was disposed of in the year please provide details/invoice Proceeds Date Sold							
If new vehicle purchased during the year provide details/invoice/loan agreement Year/Make Purchase Price Date Purchased							
If leasing a new vehicle during the year provide details/invoice/lease agreement							
Year/MakePur	chase Price	Date Leased					