Gregory, Harriman & Associates LLP

Personal Tax Checklist 2017

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

Personal Tax Returns will NOT be efiled without payment and required signatures.

CONSENT TO USE PERSONAL INFORMATION & OTHER IMPORTANT MATTERS

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.

Name: ___________________________________ **Spouse: _______________________________**

Signature: ________________________________ **Signature: ______________________________**

If you moved in 2017/2018 provide new address:____

Do you and your spouse authorize CRA to provide information to Elections Canada? : ☐ Yes ☐ No

Are you a Canadian Citizen: ☐ Yes ☐ No * Spouse: ☐ Yes ☐ No *

*If no, please state what other citizenship you/spouse hold: ___________________________________

Marital Status: ☐ *Married* ☐ *Widowed* ☐ *Divorced* ☐ *Common-law* ☐ *Separated* ☐ *Single*

If marital status has changed during the year, provide date of change (YY-MM-DD): _____________

List any Dependents who were born/adopted in 2017:

*DOB*________________ *Name*___________________________ *Son or Daughter* ________________________

Do you, your spouse or any of your dependents qualify for the Disability Tax Credit? ☐ Yes ☐ No

How do you want your prepared 2017 Personal Tax Return returned to you?

☐ Pickup GH&A ☐ Email * ☐ Send E-Courier ☐ Express Post ($40.00) ☐ Authorizing pick up **

***Provide email address: ____**

****I hereby authorize ______________________________ to pick up my finished 2017 T1 return & information**

Have you sold/transferred a real estate property in 2017? *(including principal residence)* ☐ **Yes** ☐ **No**

If yes, what were the gross sale proceeds? _____________________Date of Purchase? _____________

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)**

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 : 2017___________ 2016 ___________ 2015 ____________

☐ **GHA LLP to prepare IRS form 8840 if required** ☐ **Client to prepare their own 8840 form**

INFORMATION SLIPS – Ensure all T-Slips are provided

- ☐ Employment and Other Income - T4, T4A
- ☐ T slips – (T4A, T4A(P), T4A(OAS), T4E, T5007)
- ☐ Do you have any Tips & Gratuities to report? $______________
- ☐ Investment/Interest (T5, T3, T5013 partnership income, T101, Bitcoin other cryptocurrency transactions)
- ☐ Pension Retirement (T4RSP, 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 number:________________ e-mail:__________________________________

DEDUCTIONS AND CREDITS - IF APPLICABLE ALL RECEIPTS/SLIPS MUST BE PROVIDED

- ☐ RRSP Contributions up to March 1, 2018
- ☐ Union and Professional Dues
- ☐ Public Transit (Jan to June 2017)
- ☐ 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)
- ☐ Alimony/Maintenance-Exclude Child Support
- ☐ Canada Caregiver Credit (Infirm family member)
- ☐ First Time Home Buyers Credit
- ☐ Volunteer Firefighter Credit *(over 300 hours)*
- ☐ Educator School Supply Credit
- ☐ Moving Expenses – *Employment/Business/ Students (GH&A LLP 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 & Group Home (attach receipts)
- ☐ Other Dental & Medical (receipts of health plan expense coverages)
- ☐ Travel Costs (if over 40 km one way) – provide listing of trips, dates and mileage – see Medical Mileage Appointment Worksheet
- ☐ Meals (if travel over 80 km one way) – provide listing of trips, dates and mileage
- ☐ Prescriptions – **(detailed listing from pharmacy including RX#, Drug Name, DIN #, & Doctor's Name)**
- ☐ Other Medical Expenses (attach receipts) – see www.gh-a.com for listing of eligible medical expenses and authorized medical practitioners

GST RETURN – DO YOU WANT GH&A TO PREPARE FOR 2017? ☐ YES * ☐ NO

Are you an annual or quarterly filer: ☐ Annual ☐ Quarterly

If you are providing data: Quickbooks/Simply/Sage/AgExpert we will need the following:

Version: ______________ Year: ______________ Login: ____________ PW: _____________

In Home Office Expenses Worksheet 2017 provided on our website: www.gh-a.com

☐ Business/Professional/Farm - Self Employment Income Checklist ☐ - all information provided in data

☐ **Income (Including - Sharing Economy – Uber etc.) $ ________________________________** *(if not provided in data)*		
☐ Advertising	☐ Interest/Bank charges	☐ Supplies
☐ Insurance	☐ Office Supplies	☐ Utilities
☐ Meals/Entertainment	☐ Rent	☐ Management/Administration
☐ Legal/Accounting	☐ Cell Phone	☐ Travel
☐ Telephone/Gas	☐ Capital Asset Purchases	☐ Property Taxes
☐ Salaries	☐ Repairs & Maintenance	☐ Business Taxes, Licenses, Dues, Membership fees
☐ Automobile *(see Automobile Expenses checklist below)*		☐ Home Office *(go to In Home Office Link @ www.gh-a.com)*
☐ Should you earn income from a website, CRA requires disclosure. web address: __________________________________		

☐ Farming – Checklist

☐ Land Sale/Purchase *(all documentation)*	☐ Equipment Sales/Purchase *(receipts/invoices)*
☐ Loan Documentation *(agreements/schedules)*	☐ Agr 1 slips
☐ Grain Advance Documentation	☐ Feeder Loan Cards
☐ New Surface/Pipeline Agreements *(receipts/compensations summaries)*	☐ See Business/Professional Checklist below for common expenses

☐ Rental- Self Employment Income Checklist ☐ - all information provided in data

☐ **Rent collected (AirBnB/VRBO) $ ________________________________** *(if not 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 property management	☐ Sale /Purchase of Rental Property *(provide Statement of adjustments for purchase and sale/legal costs/commissions)*	

☐ Automobile Expense Checklist *(please ensure that you have kept a log of KM driven during the year)*

Total KMs driven in the year for: Business _________ Personal _________		
☐ Fuel and oil	☐ License and Registration	☐ Interest on Vehicle Loan
☐ Repairs and Maintenance	☐ Parking Fees	☐ Insurance ☐ Leasing Costs
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/Make _________________ Purchase Price _________________ Date Leased _________________***		