

2016 PERSONAL INCOME TAX RETURNS PACKAGE (T1 Return)

We have enclosed information relating to the preparation of your **2016** personal tax returns for you to review, sign, and send back by **March 31, 2017** (General tax deadline: April 30, 2017):

CLIENT INFORMATION:

Name: _____	Name of Spouse: _____
SIN # _____	SIN # _____
Birth Date (MM/DD/YYYY) _____	Birth Date (MM/DD/YYYY) _____
Telephone _____	Telephone _____
Email: _____	Email: _____

Mailing Address _____

#	Child's Name:	Child's SIN #:	Child's DOB: (MM/DD/YYYY)
1			
2			
3			
4			

PLEASE ANSWER THE FOLLOWING:

(1) **NEW THIS YEAR:** Did you dispose of a property (or properties) in 2016 for which you are claiming a principal residence exemption? **YES / NO** (circle one)

(2) **Foreign Income Verification Statement (Form T1135E):**

- Applies This form must be filed with your **2016** tax return, if at any time this year the total cost amount of all specified foreign property you owned or held a beneficial interest in was more than **\$100,000 Canadian**. If this applies to you, please advise us and we will send the form to you for completion.
- Does not apply

(3) **Elections Canada:**

- Yes - allow Do you want to allow Canada Revenue Agency to provide your name, address, and date of birth to Elections Canada?
- No – do not allow

(4) **Direct Deposit:**

The Canada Revenue Agency will be phasing out cheque refunds. As such, please attach your bank account information for direct deposit of your tax refund, if applicable.

Branch (5 digits) _____ Institution (3 digits) _____ Account # (12 digits) _____

(5) **Are you a US Citizen or green card holder? YES / NO** (circle one)

PLEASE CHECK OFF THE ITEMS BELOW THAT ARE APPLICABLE TO YOUR 2016 PERSONAL TAX RETURN. RETURN THIS SCHEDULE TO OUR OFFICE TOGETHER WITH ALL COPIES OF THE RELEVANT DOCUMENTATIONS AS FOLLOWS:

Documents:

- Notice of Assessment
- Canada Revenue Agency Correspondence
- Tax Instalments made
- If prior year prepared by another accountant, please attach the full tax return

Income:

- T4 Employment slips and any other taxable benefits not reported on the T4
- T5 Investment slips
- T4A(OAS): Old Age Security
- T4AP: CPP Benefits
- Other information slips (T3, T4A, T4E, RC62)
- Child Benefit (UCCB)
- Pension income (Canada & Abroad)
- Social Assistance payments
- Workers' Compensation Benefits
- Interest and dividends
- Capital gains/losses record
- Sale of real estate –INCLUDES PRINCIPAL RESIDENCE – (proceeds, adjusted cost basis, outlays)
- Elected split pension
- Rental income/expenses
- RRSP withdrawals
- Spousal support payments Received

- Child support payments Received
- Partnership income/loss (T5013)
- Professional income/expenses
- Commission income/expenses
- Self-employment income/expenses
- Farming income/expenses
- Fishing income/expenses
- GST Rebates received
- Foreign Income
- Stock options exercised

Deductions:

- RRSP Contributions
- Union & professional dues
- Child care expenses
- Moving expenses
- Child support payments made
- Spousal support payments made
- Investment carrying charges – interest, account fees, counsel fees
- Exploration and Development expenses (T101)
- Northern residents Deduction
- Declaration conditions of Employment (T2200)
- Employment expenses
- Automobile logs
- Home office receipts

Tax Credits:

- Medical expense receipts
- Volunteer firefighter's statement
- Search and rescue volunteers' statement
- Public transit receipts
- Child fitness program receipts
- Child art program receipts
- Educator supplies receipts
- Home accessibility renovation receipts
- First-time home buyer – house purchase documents
- Adoption expenses
- Disability tax credit application (T2201) – self or dependant
- Tuition receipts (T2202) – or T2202 signed by the child to transfer to the parent
- Interest paid on student loans
- Charitable donation receipts
- Political donation receipts
- Foreign taxes paid
- Dates spent in the USA (If you vacation extensively in the USA; this will help us determine if you have any US filing requirements)

If we do not prepare the tax return of your spouse, please provide line 236 that will be reported on your spouse's 2016 tax return:

Net Income (Line 236) \$_____

Marital Status: Please check off your current marital status. If your status changed during the year (in 2016), please provide details and date of change:

Married Common-law Widowed Divorced Separated Single

Date of change (MM/DD/YYYY) _____