

**Sutherland Watt
Personal Tax Checklist 2017**

Please complete the checklist below and return to us with your tax information

Part A - Personal Information (complete **ONLY** if there is a change from the prior year)

Name:	Spouse:
Date of Birth:	Date of Birth:
Address:	Telephone: Home: Office:
Email:	Spouse's net income \$ _____ (required if we do not prepare the tax return)

Children	SIN	Date of Birth
_____	_____	_____
_____	_____	_____

Part B - General

- 1) Did you purchase your first home in 2017? Yes [] No []
- 2) Are you and/or your spouse a US Citizen or green card holder? Yes [] No []
- 3) Did your marital status change in 2017? Yes [] No []
If yes, please provide a date that the status changed _____
- 4) At any time in the year, did you own foreign property, including US securities, costing more than \$100,000? Yes [] No []
- 5) Did you sell your permanent home or cottage in 2017? Yes [] No []

Part C – Income (provide slips, documents or details)

<i>Canadian and Foreign Sources of Income (provide slips, documents or details)</i>	
Employment (T4)	Capital Gains (Provide capital gains summary from investment advisor)
Business/professional income/expenses	
Rental income/expenses	Universal Child Care Benefit (RC62)
Support payments received	2015 Notice of Assessment/any Reassessments
Employment Insurance (T4E)	Mutual Funds/estates/trusts (T3)
CPP/QPP/OAS/{T4A(P)/T4A(OAS)}	Partnerships/tax shelters (T5013/T101)
RRSP/DPSP, RPP, RRIF (T4RSP/T4RIF)	Pension/retiring allowance (T4A)
Dividends (T5)	Other sources of income: _____
Interest (T5/T600)	

Note: Through the matching program of tax information slips, the CRA is imposing harsh penalties for unreported income. Please provide us with any late or amended tax slips (i.e. slips received after sending package to Sutherland Watt) to avoid exposure to penalties.

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Part D – Expenses and tax credits

<i>Deductions and Credits (provide receipts, documents or details)</i>	
RRSP Contributions	Tuition fees (T2202 or T2202A)
Union/professional membership dues	Interest paid on student loans
Child care expenses	Charitable donations
Moving expenses	Medical/attendant care expenses
Support payments made	Adoption expenses
Accounting/legal/investment counsel fees	Political contributions
Interest paid on investments	Income tax instalments & any foreign taxes paid
Deductible employment expenses	Other expenses/tax credit amounts:
Cost of eligible public transit passes	

Part E – SELF-EMPLOYED INDIVIDUALS ONLY (do not complete if your business is incorporated)

Business Number _____

Office in Home Expenses

Area of home used for business _____

Total area of home _____

Heat _____

Insurance _____

Mortgage Interest _____

Electricity _____

Maintenance _____

Property Taxes _____

Automobile Expenses

Kilometers driven in the tax year to earn business income _____

Total kilometers driven in the tax year _____

Fuel and Oil _____

Insurance _____

Maintenance and repairs _____

Interest _____

License and registration _____

Lease cost _____