

## Personal Tax Return Checklist

Your name: \_\_\_\_\_

Spouse: \_\_\_\_\_

*If we prepared your last tax return, complete this section only if there are changes*

 SIN # \_\_\_\_\_  
 Birth date \_\_\_\_\_  
 Marital status \_\_\_\_\_  
 Address \_\_\_\_\_  
 \_\_\_\_\_  
 Phone (home) \_\_\_\_\_  
 Phone (cellular) \_\_\_\_\_  
 Email \_\_\_\_\_

 SIN # \_\_\_\_\_  
 Birth date \_\_\_\_\_  
 Phone (home) \_\_\_\_\_  
 Phone (cellular) \_\_\_\_\_  
 Email \_\_\_\_\_

 Spouse's income \$ \_\_\_\_\_  
*(if spouse is not prepared by Peter Y.H. Shum Inc.)*

Are you a Canadian Citizen?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Do you authorize CRA to provide your name, address and date of birth to Elections Canada to update your information on the National Register?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Do you own foreign property with a total cost of more than CAN\$ 100,000?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Did you dispose your principal residence in 2017?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Do you wish to elect for pension splitting if eligible or beneficial?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

*Please review each item listed and attached applicable slips, receipts and other relevant documents*

### Tax slips for the following incomes:

- Employment income (T4)
- Commissions (T4A)
- Pensions (T4A, T4OAS, T4AP)
- Statement of partnership income (T5013)
- Employment insurance benefits (T4E)
- Dividends/ interest/ capital gains (T5)
- Investments (T5013/ T5008)
- RRSP, DPSP, RRP, RRIF (T4RSP, T4RIF)
- Estates, trusts, mutual funds (T3)
- Scholarships, bursaries and fellowships (T4A)
- RRSP contribution slips
- Tuition fees (T2202, TL11A, signed by student)
- Others \_\_\_\_\_

### Official receipts for deductions:

- Charitable donations
- Transit passes (Jan – Jun only)
- Union/ professional dues
- Child care/ attendant care expenses
- Child fitness & equipment (BC only)
- Child art expenses (BC only)
- Interest paid to earn investment income
- Investment counsellor fees
- Student loan interest paid
- Medical expenses
- Others \_\_\_\_\_
- Volunteer firefighters, Search & Rescue volunteer
- Alimony/ maintenance paid & received
- Home accessibility expenses

### Documents for the following transactions:

- Notice of (re)assessment of last year's return
- Investment summary statement
- Spousal & child support
- Real estate transactions
- Home buyers plan / LLP
- Other employment income (tips & gratuities)
- Details on disposition of principal residence  
(address, year of acquisition, proceeds of disposition)
- Bitcoin & other cryptocurrency transactions

### Provide details of:

- Dependents' income
- Foreign income and foreign taxes paid
- Rental income & expenses (see schedule)
- Self-employed income & expenses (see schedule)
- Employment expenses (see schedule)

- Dependents not listed on your prior years' return:

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

Birth date: \_\_\_\_\_