



2016 PERSONAL INCOME TAX CHECKLIST SIMPLIFIED

YBL has put this checklist together to ease the tension you feel during tax time. We kindly ask that you read to the end as we've crafted this checklist to answer a lot of questions you/we may have. We are also making an effort to make our office a PAPERLESS one so please feel free to scan or take a picture with your phone and email over your tax information

NEW CRA CHANGES!

- **Children's Fitness & Arts Amount** – Completely eliminated!
- **Textbook Credit** – The tax credit for education and textbooks for full or part-time students has been eliminated.
- **Caregiver Amounts** – A new consolidated Canada Caregiver credit now exists.
- **Public Transit Credit** – Eliminated part way through 2017 as of June 30th, 2017.

- **Military Credit** – Some military salaries for Canadian Armed Forces personnel are exempt from federal income taxes
- **Fertility Assistance** – Claimable for 2017 as well as retroactively for the past **10 years!** Ask us if you'd like us to adjust your return to include these expenses.
- **Canada Child Benefit** – Increased by 1.5% for July 2018-2019 benefits.

To help us get started

- ☐ Your full contact information
- ☐ T1013 Authorizing and Cancelling a Representative (we provide)
- ☐ A confidential email address
- ☐ **NEW CLIENTS** – A copy of your previous year's tax return & NOA
- ☐ **CURRENT CLIENTS** – Any CRA correspondence during the year

Personal

- ☐ SIN & DOB for all
- ☐ Children & Adoption information

PLEASE inform us of changes

Receipts

- ☐ Childcare expenses
- ☐ Disability tax credit (T2201)
- ☐ Adoption expenses
- ☐ Donations (and political contributions)
- ☐ Medical expenses
- ☐ Public Transit expenses (up to June 30th)
- ☐ Tuition (T2202A & TL11A)
- ☐ Apprentice with tool receipts*
- ☐ Capital Gains/losses*
- ★ Ask us for a template to help you track your receipts!

Other Slips/Forms

- ☐ RRSP & RESP
- ☐ Student loan & interest
- ☐ T2200 Conditions of Employment
- ☐ Tool Expenses
- ☐ Union & Professional dues
- ☐ Child support payments
- ☐ Moving expenses
- ☐ Volunteer Firefighters
- ☐ Alimony payments
- ☐ Home Buyers' Plan & LLP
- ☐ Legal fees incurred to obtain or enforce spousal/child support

Income Slips

- ☐ T4/T3/T5
- ☐ T4A - Pensions & Annuities
- ☐ T4AOAS - Old Age Security
- ☐ T4AP - CPP Benefits
- ☐ T4E - EI & Other Benefits
- ☐ RC62 - UCCB
- ★ Let us know if you earned income outside of Canada

Ask us about our detailed checklist with more business information and our business templates!