

# LLS Financial Services Inc.

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## 2017 TAX RETURN CHECKLIST

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

**PLEASE BE SURE TO BRING ALONG ANY OF THE FOLLOWING RECORDS WHEN YOU COME IN TO HAVE YOUR INCOME TAX PREPARED**

### Employment Income / Deductions

- Employment Income T4
- Employment Insurance T4E
- Employment Profit-Sharing T4PS
- Union/Professional Dues Receipts
- Support Income (spousal/child)

### Pension Income

- Old Age Security T4(OAS)
- CPP T4A(P)
- Pension T4A
- RRSP / RPP T4RSP
- RRIF T4RRIF

### Investment Income / Deductions

- Interest T5/T600
- Dividends T5
- Trust Income T3
- Tax Shelters T5013

### Other Slips and Receipts

- Condition of Employment T2200
- Student Loan Interest Receipts
- Tuition T2202A
- Moving Expenses
- Medical Receipts
- Educator School Supply Credit
- RRSP Contribution Receipts

- Home Accessibility Tax Credit (visit our web site for more information)
- Child Day Care Expense Receipts (Include Name/Address/SIN # of caregiver)
- Support Expenses (spousal/child)
- Charitable Donation Receipts
- Political Donation Receipts

- Rental Expense Receipts
- Property Tax Receipt
- Public Transit Tax Credit – monthly passes before July 1, 2017)
- Ontario Seniors Public Transit Tax Credit – monthly passes July 1, 2017 to December 31, 2017

### Other Items to Consider

- Disposal of any Non-Registered Investments/Non Registered Mutual Funds/Real Estate  
**All trade transactions and monthly statements for the year. Be sure to include your December 31<sup>st</sup> Statement(s)**
- Sale of principal residence – Address, Year of Acquisition and Sale Proceeds – was this your principal residence from the date of acquisition to date of sale?
- Rental Income/Expenses – worksheet as provided on our web site
- Self Employment Income/Expenses – worksheet (2 pages) as provided on our web site

**Please provide us with your most current Notice of Assessment from Canada Revenue Agency (CRA) or the following information:**

- RRSP Contribution Room \$ \_\_\_\_\_
- Home Buyers Plan (HBP) Repayment \$ \_\_\_\_\_
- Life Learning Plan (LLP) Repayment \$ \_\_\_\_\_
- Non capital and Capital Loss carried forwards \$ \_\_\_\_\_

### Notes / Questions

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