

Instructions: Please complete this checklist and return it to Yvonne Sulentic, Inc. with your personal income tax information (slips and receipts, etc.)

Name: _____

Social Insurance Number: _____

Address: (if different from last year)

Street _____

City, Province _____

Postal Code _____

Telephone: _____

*** Please indicate preferred method to receive T183 - *Consent for Electronic Filing of your tax return*

By Email E-mail address: _____

By Fax Fax number: _____

Birth date: _____

Province of Residence
on December 31, 2017: _____

Are you a Canadian Citizen? Yes No

Canadian citizens only:
"Do you authorize the Canada Revenue Agency to provide your name, address,
and date of birth to Elections Canada for the National Register of Electors?" Yes No

Do you wish to start direct deposit or to change account information for your tax refund? Yes No
(If yes, attach a "void" personalized cheque or provide your financial institution name, branch and account number)

Marital Status: Single Married Separated Divorced Widowed Common-Law

Information about spouse or common-law partner (if Yvonne Sulentic, Inc. is not preparing return of spouse or common-law partner):

Name: _____

SIN Number: _____

Birth date: _____

Net Income: \$ _____

Is your spouse self-employed? Yes No

If eligible, do you wish to split pension income with your spouse? Yes No

Dependents:

Name	Birth Date	Net Income (if any)	S.I.N. (if applicable)
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Please ensure the following information is forwarded to us as soon as available:

Check if Information Attached

1. All information slips:

Employment	T4, T4A	<input type="checkbox"/>
Partnership income	T5013	<input type="checkbox"/>
Pension or Disability Payments	T4A	<input type="checkbox"/>
Interest	T5	<input type="checkbox"/>
Dividends	T5	<input type="checkbox"/>
Mutual Funds and Other Trusts	T3	<input type="checkbox"/>
Old Age Security	T4A (OAS)	<input type="checkbox"/>
Canada Pension	T4A (P)	<input type="checkbox"/>
Employment Insurance	T4E	<input type="checkbox"/>
Income from RRSP or RRIF	T4RSP; T4RIF	<input type="checkbox"/>
Purchase and Sale of Securities	T5008	<input type="checkbox"/>
Social Assistance, Workers Compensation	T5007	<input type="checkbox"/>
Apprenticeship Incentive Grant	T4A (Box 28)	<input type="checkbox"/>
Other, including Foreign Slips		<input type="checkbox"/>

2. All official receipts:

Check if Information Attached

Registered Retirement Savings Plan Contributions	<input type="checkbox"/>
Charitable Donations	<input type="checkbox"/>
Political Donations	<input type="checkbox"/>
Professional or Union Dues	<input type="checkbox"/>
Tuition Fees: (T2202/2202A/TL 11A*)	<input type="checkbox"/>
<i>*If receipt is for a dependant, please have dependant sign in appropriate place on the form.</i>	
Public Transit (period from January 1, 2017 to June 30, 2017)	<input type="checkbox"/>

3. List of income and expenses for rental property.

(Please fill out the Rental Properties Checklist on our website)

4. List of income and expenses from self-employment activities.

(Please fill out the Self Employment Checklist on our website)

5. Details of employment expenses:

(In order to claim these expenses, employees must attach Form T2200 "Declaration of Conditions of Employment" signed by their employer.)

Automobile Expenses

Note: If more than one vehicle is used for business purposes, provide a separate listing of expenses.

Cost of vehicle, if purchased in the year (attach invoice)	\$ _____
Proceeds received on disposal of old vehicle, if applicable	\$ _____
Gas and oil	\$ _____
Repairs and maintenance	\$ _____
Insurance	\$ _____
License	\$ _____
Total kilometers driven for the year	_____
Business kilometers driven for the year	_____

**** Please note that in order to substantiate your automobile expenses you should have kept a travel log for the year. The log should indicate the date, destination to and from, and the business purpose of each trip.**

Office-in-the-home-expenses

Measurements

Square footage of entire house _____ sq. ft.

Square footage of room used for office _____ sq. ft.

Expenses

Utilities (heat, water, electricity) \$ _____

Insurance \$ _____

Maintenance \$ _____

Mortgage interest \$ _____

Property tax \$ _____

Other Specify: _____ \$ _____

Other Specify: _____ \$ _____

6. Family Expenses:

Amount of support payments or alimony payments paid or received and \$ _____

name and address of payor/recipient _____

Details regarding child care expenses _____ \$ _____

Adoption Expenses \$ _____

7. Investments

- Listing of investments on which accrued interest is required to be reported and for which a tax reporting form has not been received \$ _____

- Carrying charges and interest paid to earn income from investments (including investment counsel fees; but safety deposit box fee is no longer qualified as carrying charges starting 2014) \$ _____

- Details on disposition of capital property (stocks, mutual funds, or other properties) Provide original purchase cost, sales proceeds and expenses on disposition \$ _____

- Disposition of real property (original purchase date and cost, sales date, proceeds and expenses on disposition), including sale of your principal home. (If you changed the use of a real property, e.g. convert all or part of your principal residence to a rental or business operation or vice versa, it is considered a deemed disposition and needs to be reported.) \$ _____

8. Other items:

- Any other income received during the year Please provide amounts and description _____ \$ _____

- Professional Dues or Membership fees \$ _____

- Form T1212 – Statement of Deferred Stock Options Benefits \$ _____

- Amount of lifelong learning plan withdrawal or home buyer's plan withdrawal from your RRSP in the year \$ _____

- Amount of RRSP contribution designated as loan repayment of a prior year loan \$ _____

- Amount of interest paid on student loans \$ _____

- Amount of medical expenses paid personally (For self, spouse or dependent). \$ _____
- Details regarding eligible moving expenses _____ \$ _____
- Are you entitled to a disability amount for yourself or a dependant? Yes No
- Are you entitled to a disability supports deduction amount for yourself or a dependant? Yes No
- If you or your dependant are eligible for the disability tax credit, or if you or your dependant are 65 years of age or older at the end of the year, did you incur renovation expenses to your owned home to allow you or your dependant to gain access to; to be mobile or functional or to reduce the risk of harm to you or your dependant within the dwelling? (tax credit available) Yes No
- Are you a first-time home buyer? (tax credit available) Yes No
- Are you a first-time donor? (additional tax credit available; 2017 is the last year to claim this credit) Yes No
- If you are an eligible educator, did you buy teaching supplies in the year (refundable tax credit available) Yes No
- Amount of instalment payments made for the year (attach statement) \$ _____

9. Are you a U.S. citizen or do you hold a valid U.S. green card? * Yes No
 *If you are a U.S. citizen or hold a valid U.S. green card you are required to file a U.S. income tax return and may be required to file certain U.S. information returns. If you have not been filing any U.S. returns, please contact us immediately.

10. Did you own foreign property at any time during the year, and the aggregate cost of which exceeded \$100,000? Yes No
 (**If yes, there are foreign reporting requirements.)