

Personal Tax Checklist

ASHERN • BIRTLE • NOTRE-DAME-DE-LOURDES • OAK BLUFF • STEINBACH • WINNIPEG (ST. BONIFACE & ST. NORBERT)

Please notify us of any changes:

- Address _____
- Marital status _____
- New dependents _____

Income Items:

- Previous year's Notice of Assessment
- All information slips (i.e. T3, T4, T4A (OAS), T4A (P), T4PS, T4E, T4RSP, T4RIF, T5, T5008, UCCB)
- Investment income not reported on slips (interest, dividends, capital gains)
- Partnership statements
- Business, professional, agricultural or rental property income and expenses
- Sale of property including stocks, bonds, and real estate (please provide details)
- Did you receive any gratuities?
- Foreign income/investments
- Additional information: _____

Tax Credits:

- Medical expenses (sort and add own medical receipts to reduce fees)
- Disability tax credit – form T2201
- Tuition fees - form T2202A (signed by student)
- Charitable donations
- Tax instalments (slips or details)
- Property taxes or rent paid
- Children's arts/fitness amount
- Public transit amount
- Adoption expenses

Deductions:

- RRSP contributions
- Union and/or professional dues
- Child care expenses
- Interest expense related to business or investments
- Safety deposit box (applicable for 2012 and earlier years)
- Alimony or child support
- Moving expenses
- Employment expenses (automobile and home office) - Please provide a signed T2200 form from your employer
- Prior year losses

*Starting in 2012 and subsequent years, mandatory e-filing is required for all tax returns. If you would like for us to paper-file your return, a surcharge of \$40 will apply. (Non-compliance will result in CRA assessing a penalty to our firm.)

FEES (\$)

Basic Charge	89.95	Tuition Fee Schedule	5.75
T3 (per slip)	7.95	Transfer of Tuition Fee from a Student	starting at 10.50
T4 (per slip)	7.95	T1005 - Manitoba Tuition Fee Rebate	20.00
T5 (per slip)	7.95	Paper File Return (*)	40.00
T4A (P) / T4A (OAS) & most other T-slips (per slip)	7.95	Fitness Tax Credit	10.50
Capital Stock Transaction (per transaction)	5.50	Children's Arts Amount	10.50
Child Care Expense Schedule	15.00	Home Buyers Plan	1.50
Donations (per receipt)	1.00	Family Tax Cut (per couple)	10.50
Manitoba Provincial Tax Credit	10.00	T1 Adjustments	starting at 45.00
Medical Expense Schedule	starting at 15.00	Pension Income Splitting (per person)	15.00
Moving Expense Schedule	starting at 35.00	Other Credits	As applicable
RRSPs (per slip)	3.95	Disbursements	As applicable

Fees do not include processing reviews or audits.

*A surcharge will apply if we receive any additional slips after completion of your tax return.

*A surcharge may also apply if the information to prepare your income tax return is received after April 15th, 2017.