



Aries Accounting

#202 - 879 Anders Road
West Kelowna, BC V1Z 1K2
Phone: 250-454-9483

Office Use Only	
Client Number	
Date Received	

2017 INCOME TAX CHECK LIST

Name: _____ Birthdate: yyyy/mm/dd _____ SIN: _____

Spouse Name: _____ Birthdate: yyyy/mm/dd _____ SIN: _____

Marital Status: Married / Single / Divorced / Separated /
Widowed / Common Law _____ Did this change in 2017? If yes, please provide date. _____

Address: _____

City: _____ Postal Code: _____

Primary Phone: _____ Did you move in 2017? Yes No

Email: _____

Names of Dependents:

Name	Birthdate	SIN	Child Care Costs	
			Yes <input type="checkbox"/>	No <input type="checkbox"/>
			Yes <input type="checkbox"/>	No <input type="checkbox"/>
			Yes <input type="checkbox"/>	No <input type="checkbox"/>
			Yes <input type="checkbox"/>	No <input type="checkbox"/>

Income – Receipts and Information Required

- Salaries, Commissions (T4, T4A slips)
- Pension Income - OAS/ CPP / Other
- EI Benefits
- Investment Income (T3, T5 slips)
- Rental Income Yes No
- Taxable Capital Gains/Losses (Details of Cost/Sale price)
- RRSP/RRIF Income (T4RSP slips)
- WCB Benefits
- Self-Employed Yes No (*Add'l info required)
- Apprentice Grant (BC proof of completion)
- Other _____ (Attach details)

Deductions – Receipts and Information Required

- Childcare Expenses (Attach details)
- Teacher/Child Educator School Supply Tax Credit (Attach receipts)
- Moving Expenses (Provide receipts and details)
- Extended Health Benefits (Not MSP)
- Medical & Dental Expenses
- Charitable/Political Donations (Official Receipts)
- Interest Paid on Student Loans (Attach Stmt)
- RRSP Contributions
- Union or Professional Dues
- Employment Expenses (if applicable – attach T2200)
- Investment Interest/Other Charges
- Education: Tuition (T2202 Slip)
- Public Transit Passes Amount (Transit Pass & Receipt)
- Other _____

Other Information

- 2017 Instalments paid (CRA Stmt)
- Notice of Assessment from 2016 (All pages)
- Prior year tax return (if this is the first year of Aries filing your taxes)
- RRSP Home Buyer's Withdrawal (Provide details)
- First Time Home Buyer (Provide legal documents)
- Northern Resident Deduction (Must have lived in prescribed zone for at least 6 months)
- Did you sell your home in 2017? This must now be reported to the CRA.
- Are you a Teacher or Early Childhood Educator?
- Are you 65 years of age or eligible for the DTC? Did you perform renovations on your home to enhance mobility or reduce risk of harm?

Are you a Canadian Citizen? Yes No

If yes, do you allow CRA to release information about you to Elections Canada? Yes No

Do you own foreign assets worth more than \$100,000? Yes No
If yes, please provide details.

Are you a US Citizen? If yes, you may be required to file a US tax return. Yes No

Were you **OR** your parents born in the US? Yes No
If yes, you may be required to file a US tax return.

Would you like to receive our newsletters for tax tips and important information? Yes No

Are you registered for My Account with CRA or do you have a My Service Canada Account with Service Canada? Yes No

If no, would you like to be registered for one? If yes, please ensure you have provided a valid email address for each family member who would like to register. An email with instructions will be sent to you. Yes No