

## SCHEDULE A – PERSONAL INFORMATION

- Please let us know if there has been any change in your:
  - Address
  - Home phone number
  - Work phone number
  - Cell phone number
  - E-mail address
  - Marital status
  - Dependents
- Is one of your dependants in attendance at a college or university? Please provide details concerning the name of institution, number of months in attendance, tuition fees, net income of dependant, and completed Form T2202
- Are you or any of your dependants disabled? Please provide Form T2201 - Disability Credit Certificate signed by your physician. If you require a form please download from our website <http://www.silvergoren.com>.
- Did you withdraw monies from your RRSP in order to buy a home under the Home Buyers' Plan, the Lifelong Learning Plan or from a Registered Education Savings Plan? Please provide us details of the withdrawal.
- Did you receive a 2015 Notice of Assessment that resulted in an amount of taxes payable **different than calculated by our office**? Please provide a copy of the Notice of Assessment
- Did you adopt a child? Please provide details of your costs. See Schedule F below.
- Did you start a new business, purchase a new rental property or farm? Please provide all relevant details of the acquisition costs.
- Did you acquire any interest in foreign property that had a cost greater than \$100,000? Please provide information as to the amount that you paid.
- Did you or your spouse turn 71 during the year? Please contact our office to discuss possible tax planning opportunities.
- Did you retire or change jobs and receive retirement or severance compensation? Please contact our office to discuss possible tax planning opportunities.

## SCHEDULE B – INFORMATION FROM T SLIPS

Please submit to our office official receipts for the following:

- T3 Investment Income
- T4 Salary Information
- T4A Other Income such as commissions earned or withdrawal from RRSP's
- T4A (OAS) Old Age Payments
- T4A (P) Statement of Canada Pension Benefits
- T4A (RCA) Payments out of a retirement compensation arrangement
- T4PS Employee Profit Sharing Plan

- T4RIF Registered Retirement Income Fund
- T4RRSP RRSP Income
- T4RP Pension Income Receipts
- T4E Employment Insurance
- T5 Interest, Dividends and Other Income
- T10 Pension Adjustment Reversal
- T101 Receipts out of a tax shelter
- T5006 A labour sponsored venture contribution
- T5007 Social assistance or worker's compensation payments received
- T5013 Reporting form for limited partnerships (tax shelters)
- T600 Canada Savings Bonds Interest
- RC 62 Universal childcare benefit statement
- RC 210 Working income tax benefit advance payments statement
- T4A NR Statement of fees, commissions paid to non-residents for services rendered in Canada
- T5003 Statement of tax shelter information
- T5004 Claim for tax shelter loss or deduction
- T5008 Statement of securities transactions
- T776 Statement of rental income
- T2042 Statement of farming activities
- T2121 Statement of fishing activities
- T2125 Statement of business activities
- T1204 Statement of government contract payments
- T5018 Statement of contract payments

***If you have received income from any of the above sources but have not received the relevant information slips, please contact the issuer to obtain a duplicate copy.***

## SCHEDULE C – INCOME WITHOUT T SLIP

Please provide details of other income you might have received for which you did not receive any tax information slips such as:

- Other employment income e.g. tips earned, etc.
- Business income – Please complete our tax checklist for self employed income that you can receive from our office or download from our website <http://www.silvergoren.com>. **Do not submit any of your receipts as all we require is your summary.**
- Partnership income – attach relevant financial statements
- Rental income – Please complete our tax checklist for rental properties that you can receive from our office or download from our website <http://www.silvergoren.com>. **Do not submit any of your receipts as all we require is your summary.**
- Alimony support which is taxable to you – provide name, address, SIN of payer and amounts received. If you are not sure if this is taxable to you please contact our office.
- Interest income earned but not yet received – example compound Canada Savings Bonds, Term Deposits longer than one year
- Directors fees for which you did not receive any information slips
- Real estate or oil and gas investments – provide financial statements and information packages
- Details of any foreign income received and foreign taxes paid. Please provide us with a copy of any foreign income tax returns that you have filed or discuss with us any tax returns that you are required to file.

## SCHEDULE D – CAPITAL GAINS AND LOSSES

- Provide full particulars of the original cost and final selling price plus any selling costs for the sale of any securities, real estate or other capital properties sold during 2016.
- If you sold real estate please provide a copy of your solicitors reporting letter, including statement of adjustments.
- If you sold any stocks or other marketable investments, **please request a summary of all stock transactions for the year from your stockbroker or investment advisor and provide to us.**

## SCHEDULE E – DEDUCTIONS FROM NET INCOME

Submit official receipts to our office for:

- Registered Retirement Savings Plan contributions
- Professional and union dues
- Past service pension plan contributions -- provide details and information slips
- Were you required, as a condition of your employment to incur and pay for your own travel and other expenses? Provide form T2200 “Declaration of Conditions of Employment”, signed by your employer. If you require the form please download from our website <http://www.silvergoren.com>
- Please complete our tax checklist for employment expenses that you can receive from our office or download from our website <http://www.silvergoren.com>. **Do not submit any of your receipts as all we require is your summary.**
- Did you pay interest on money borrowed to purchase investments? Please provide us with total interest paid.
- Did you incur Investment counsel fees on open account investments? Please provide total expenses.
- Did you incur moving expenses in order to move more than 40 km closer to a new job or business? Please provide details for total cost incurred.
- Child care expenses – Please provide the name, address and SIN of the individuals to whom child care expenses were paid. Also, include the name, age of dependent, and amount paid re summer camp fees. If overnight camp, please provide number of weeks in attendance.
- Provide total paid for Accounting fees
- Provide total for legal fees paid in the context of your employment or child support
- Provide details of any loss on a business investment
- Provide cost of attendant care and equipment purchased if you or dependant are disabled and required assistance in maintaining your employment.
- Provide details of Alimony or support payments made during the year if tax deductible (provide name, address, SIN of recipient).

## SCHEDULE F – PAYMENTS WHICH MAY ENTITLE YOU TO A TAX CREDIT

Please provide:

- Property taxes or rent paid in 2016 along with name of landlord or municipality.
- Provide official receipts for Interest on qualifying student loan payments.
- Eligible adoption expense including fees paid to adoption agencies and travel expenses.
- Tuition fees and Form T2202 for education credit for yourself or dependants.
- Provide official receipts for charitable donations.
- Provide receipts for medical expenses including private health services premiums paid, medical, hospital, dental, and disability maintenance expenses paid by you and not fully reimbursed by health insurance plans for any 12 month period ending in 2016. For your drug receipts please contact your pharmacy and obtain from them a summary for the entire year of your drug purchases for your entire family.
- Provide official receipts for political contributions.
- Provide official receipts for payments made for children under 16 for fitness programs.
- Provide official receipts for payments made for children under 16 for artistic and recreational programs.
- Provide official receipts for monthly transit passes.
- Are you a teacher or early childhood educator? Please provide your total eligible supplies expense and a copy of your employer's certification attesting to the eligibility of these expenses.
- Did you make any permanent modifications to your home in order to improve accessibility or allow a senior to be more functional at home? Provide a summary of the costs incurred.

## SCHEDULE G – SALE OF PRINCIPAL RESIDENCE

Beginning in 2016, you must report the sale of your home even if you are claiming the principal residence exemption for all the years that you owned it.

If you sold your home please provide the following information:

- The address of the home
  - Date you originally purchased the home
  - Date you sold the home
  - The final selling price and any selling costs
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- If you owned more than one residential property (e.g., cottage, ski chalet, winter home, etc.) at any time during the period you owned the home you sold, please contact our office as there can be significant income tax implications to your choice of principal residence.