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2017 PERSONAL TAX ORGANIZER

1. Personal Information

	Name	SIN	Date of Birth (dd/mm/yyyy)	Phone	
Taxpayer				Office	
Spouse				Home	
Address				Cell	
Email					

Marital Status: Married Single Common-law Separated Divorced Widowed

Date of change if applicable: _____

2. Dependants

Name	SIN	Date of Birth (dd/mm/yyyy)	Relationship	Net Income

3. General Information

- | | | |
|--|-----------------------------------|------------------------------|
| 2017 Income tax instalments paid (Form T7D) | <input type="checkbox"/> Included | <input type="checkbox"/> N/A |
| 2016 Notice of Assessment, unless retained by our office | <input type="checkbox"/> Included | |
| 2016 Income tax return if not prepared by our office | <input type="checkbox"/> Included | |

4. Income

- Salary, Wage or commission (T4) Yes No
- EI benefits (T4E) Yes No
- Dividends (T5/T3) Yes No
- Interest (T5/T600/T3) Yes No
- Other investment income Yes No
- Receipt of alimony/separation payments (name, address), agreement Yes No
- Universal child care benefit statement (RC62) Yes No
- Worker's compensation, social assistance, supplements (T5007) Yes No
- Old Age Security (T4A OAS) Yes No
- Canada Pension (T4AP) Yes No
- Other pensions (T4A) Yes No
- RRSP income (T4RSP) Yes No
- RRIF income (T4RIF) Yes No
- Foreign pensions (USA, other) Yes No
- Statement of Partnership Income (T5013/T5013A) Yes No

Please provide slips or receipts for all items marked as Yes

5. Self-employed

- Attach financial statements or complete the attached self-employed business activity checklist Yes N/A
- If, in 2017, you were at least 65 years old but under 70, you received CPP/QPP retirement benefit, you did not earn employment income, do you elect not to pay CPP contributions on self-employed earnings? Yes No

6. Rental Property

- Attach rental statement or complete the attached rental activity checklist for each rental property Yes N/A

7. Allowable Deductions/Credits

- Accounting fees Yes No
- Adoption related expenses Yes No
- Attendant care expenses Yes No
- BC Home Renovation Tax Credit for Seniors and Persons with Disabilities (refundable) Yes No
- Federal home accessibility tax credit Yes No
- Charitable donation (including donation by way of gifting an item in kind) Yes No
- For new clients:** Does your charitable donation qualify for the first-time donor's super credit?
(To qualify neither you nor your spouse or common law partner has claimed a charitable donation credit in any taxation years after 2007.) Yes No
- Child care expenses (include name, address and SIN of person providing the child care) Yes No
- Child fitness credit/arts credit for BC (max \$500 each) Yes No
- Commission/employment expenses (Please complete the attached commission/employment expenses checklist) Yes No

Canada caregiver credit	<input type="checkbox"/> Yes <input type="checkbox"/> No
First-time home buyers' amount	<input type="checkbox"/> Yes <input type="checkbox"/> No
Home buyer's amount for home bought for a related person with a disability	<input type="checkbox"/> Yes <input type="checkbox"/> No
Interest expense on investment loans	<input type="checkbox"/> Yes <input type="checkbox"/> No
Interest paid on qualified student loans	<input type="checkbox"/> Yes <input type="checkbox"/> No
Investment counsel fees	<input type="checkbox"/> Yes <input type="checkbox"/> No
Medical expenses	<input type="checkbox"/> Yes <input type="checkbox"/> No
Moving expenses	<input type="checkbox"/> Yes <input type="checkbox"/> No
Payment of alimony/separation payments (name, address and SIN # of recipient)	<input type="checkbox"/> Yes <input type="checkbox"/> No
Political donation (BC and Federal)	<input type="checkbox"/> Yes <input type="checkbox"/> No
Professional membership fees if not reimbursed by your employers	<input type="checkbox"/> Yes <input type="checkbox"/> No
Public transit passes January to June 2017	<input type="checkbox"/> Yes <input type="checkbox"/> No
RRSP contribution (please include details regarding Home Buyers' Plan withdrawals and repayments and Lifelong Learning Plan repayment)	<input type="checkbox"/> Yes <input type="checkbox"/> No
T101 Statement of Resource Expenses	<input type="checkbox"/> Yes <input type="checkbox"/> No
Tuition over \$100 for yourself or your child (ensure Form T2202/T2202A is signed by your child on both sides & provide child's line 236 net income for tuition transfer to you)	<input type="checkbox"/> Yes <input type="checkbox"/> No
Union dues	<input type="checkbox"/> Yes <input type="checkbox"/> No
Volunteer fire-fighters' credit	<input type="checkbox"/> Yes <input type="checkbox"/> No

Please provide receipts for all items marked as Yes

8. Disposals Resulting in Capital Gains or Losses

Applies to disposals of shares, real estate, bonds, etc. Yes No

If yes, provide the following:

- Description of asset
- Selling price, sale date & selling cost
- Purchase cost & purchase date
- Details of any previous capital gain exemptions claimed and capital gains elections (February 22, 1994)
- Capital gains reserves (form T2017)
- V-Day Value (Dec. 1971), if applicable

Please provide documentation for the above

9. Principal Residence (Actual or Deemed Disposal)

Reporting requirement for 2016 and beyond – must be reported.

Actual disposals or deemed disposals (e.g. change in use from or to rental) Yes No

If yes, provide the following:

- Address
- Year of acquisition
- Proceeds of disposition (actual disposal)
- Value at time it was changed to rental or at date of death (deemed disposal)

Please provide documentation for the above

10. Personal Exemptions

Provide details of spouse's line 236 net income (if applicable) unless we prepare the tax return.

Yes No

11. Other

- + 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 your branch, institution and account number.
- + Do you have any foreign property, including cash, stocks, real estate, tangible or intangible property, with a combined original cost in excess of \$100,000 Canadian at any time in the year? Please note: shares of a non-resident corporation on deposit with a Canadian broker or shares of a Canadian corporation on deposit with a foreign broker count. Yes No
If yes, please provide details of the foreign property you hold. If the foreign property is held by a broker or financial institution they may provide a specific report with the required information. If they do not provide this report, please provide your investment account statements for the year. Yes No
- + Do you authorize Canada Revenue Agency to provide your name, address and date of birth to Elections Canada to update your information on the National Register of Voters? Yes No

12. What's New for 2017?

The 2017 **top tax rates** for BC residents are 47.7% on **regular income**, e.g. wages, interest, and rental income, 40.95% on **non-eligible dividends**, 31.3% on eligible dividends and 23.85% on capital gains. These rates apply to income over \$202,800.

Starting 2017, the **Canada Caregiver Credit** replaces the caregiver credit, infirm dependent credit and family caregiver tax credit. The dependent will not be required to live with the caregiver in order for the caregiver to claim the credit. However, a credit will no longer be available in respect of a non-infirm individual over 65 years of age who resides with their adult child (caregiver). The maximum credit for 2017 for each infirm dependent is \$6,883.

Children's fitness tax credit and arts tax credit has been eliminated for 2017 and beyond for federal tax and will be eliminated after 2017 for BC tax.

Public transit tax credit has been eliminated for public transit use that occurs after June 2017.

The federal **education and textbook tax credits** has been **eliminated for 2017 and beyond** (BC credits are still available). For the **federal tuition tax credit**, effective for courses taken after 2016, tuition fees paid for occupational skills courses offered by a university, college or other post-secondary institution that **are not** at the postsecondary level will qualify for this credit, if the individual takes the course to acquire skills in an occupation and is at least 16 by the end of the year.

Starting 2017, **nurse practitioners** can certify the eligibility for the disability tax credit.

13. What's New for 2018?

The 2018 **top tax rates** for BC residents are 49.8% on **regular income**, e.g. wages, interest, and rental income, 43.73% on **non-eligible dividends**, 34.2% on eligible dividends and 24.9% on capital gains. These rates apply to income over \$205,842.