

# 2017 Tax Year Checklist

NEW CLIENTS

## Important Information:

- **Revised pricing:** reflects investing client discount (no changes to prices for You First investing clients)
- If you have a non-registered account at YF, please drop off your taxes after April 1<sup>st</sup> 2018
- Are you self-employed? Please enter totals on the YF Worksheet. We do not need receipts [BC Hydro, Cell, etc]
- Do you have a non-registered account outside of YF? Please provide copies of your capital gain/loss statement
- The Children's Art and Fitness Credit has been discontinued
- The RC62 Universal Child Care Benefits has been discontinued. Canada Child Benefit payments are not taxable.
- You may only claim expenses for Public Transit Passes for the months of January to June 2017

## YOUR INFO

Pick Up  Mail to my home ~\$3  Express Post ~\$18

Your Name	Your SIN/DOB
Spouse Name	Spouse SIN/DOB
Your Email	Phone #
Address for Tax Return:	

LIVING IN BC on December 31 <sup>st</sup> , 2017? Yes <input type="checkbox"/> No <input type="checkbox"/> If not, where:
MARITAL STATUS: Single <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> Divorced <input type="checkbox"/> Common Law <input type="checkbox"/> Date of Change [d/m/y]:
CANADIAN CITIZEN? Yes <input type="checkbox"/> No <input type="checkbox"/> SPOUSE CANADIAN CITIZEN? Yes <input type="checkbox"/> No <input type="checkbox"/>
FOREIGN PROPERTY / INVESTMENTS more than \$100,000 Canadian \$
SOLD PROPERTY? Purchase \$                      Sell \$                      # years owned:                      # years principal residence:
BOUGHT PROPERTY? Yes <input type="checkbox"/> No <input type="checkbox"/> Purchase \$

## IF WE ARE NOT DOING YOUR SPOUSE'S TAXES

Spouse Name	2017 Estimated Earnings \$
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## DEPENDENTS

Name / DOB	Name / DOB
Tuition	Tuition
Childcare Expenses / # of weeks	Childcare Expenses / # of weeks
Disability Tax Certificate? Yes <input type="checkbox"/> No <input type="checkbox"/>	Disability Tax Certificate? Yes <input type="checkbox"/> No <input type="checkbox"/>

## OTHER DOCUMENTS / RECEIPTS in addition to the regular T-Slips

Union/Professional Dues	T5008	Dec 31 Investment Statements [gain/loss]
T2200 [employment expenses]	Commissions [NOT on T4]	Spousal Support Paid/ Received/ Taxed?
Tuition Receipts	Server Tips \$	YF Checklists [Moving/ Rental/ Medical]
Student Loan Interest Paid	Donations	Notice of Assessment
		Regular T-Slips: T4, T4A, T3, T5, T4RSP, T4RIF, T4OAS, T4AP

## PRICING Revised pricing listed below. Reflects investing client discount

	Investing Client	Tax Only Client		Investing Client	Tax Only
Basic Return <i>[this sheet]</i>	\$55	\$85	Foreign Income Worksheet	\$50 *	\$80 *
Medical Expenses	\$45 *	\$75 *	GST Return	\$40 *	\$60 *
Moving Expenses	\$65 *	\$100 *	Other Forms	\$45 *	\$65 *
Rental Income	\$125 *	\$200 *	Extra Time (per hour)	\$45 *	\$65 *
Business Income	\$225 *	\$300 *	<i>* We may charge more if complex + if no worksheets</i>		
Employment Expenses	\$105 *	\$150 *	<b><i>We accept e-transfers, cheques, credit, cash.</i></b>		
Capital Gains	\$75 *	\$110 *			

*2-week turnaround: Your return will be completed by April 30<sup>th</sup> provided we have all required information at least 2 weeks prior.*