



## Section 217 Election Checklist

A Section 217 tax return is for non-residents who have Canadian-based pension income and want to pay tax based on their actual income (instead of just having tax withheld at source and not filing).

Personal Information			
First Name		Last Name	
Date of Birth		S.I.N.	
Home Phone		Cell Phone	
Address			
Marital Status	<input type="checkbox"/> Single <input type="checkbox"/> Separated	<input type="checkbox"/> Married <input type="checkbox"/> Divorced	<input type="checkbox"/> Common-law <input type="checkbox"/> Widowed
Spouse Information			
First Name		Last Name	
Date of Birth		S.I.N.	
Net Income in Tax Year		Self-Employed	YES <input type="checkbox"/> NO <input type="checkbox"/>
Dependent Information			
Full Name			
Date of Birth			
S.I.N.			
Net Income in Tax Year			

## Section 217 Election

√	Canadian Pension Sources
<input type="checkbox"/>	Old Age Security (OAS) Pension
<input type="checkbox"/>	Canada Pension Plan (CPP) & Quebec Pension Plan (QPP) Benefits
<input type="checkbox"/>	Private Pension Benefits
<input type="checkbox"/>	Registered Retirement Savings Plan (RRSP) Payments
<input type="checkbox"/>	Pooled Registered Pension Plan (PRPP) Payments
<input type="checkbox"/>	Registered Retirement Income Fund (RRIF) Payments
<input type="checkbox"/>	Death Benefits
<input type="checkbox"/>	Employment Insurance (EI) Benefits
<input type="checkbox"/>	Retiring Allowances
<input type="checkbox"/>	Registered Supplementary Unemployment Benefit Plan Payments
<input type="checkbox"/>	Deferred Profit-Sharing Plan Payments
<input type="checkbox"/>	Amounts Received from a Retirement Compensation Arrangement, or the Purchase Price of an Interest in a Retirement Compensation Arrangement
<input type="checkbox"/>	Prescribed Benefits under a Government Assistance Program
<input type="checkbox"/>	Auto Pact Benefits
<input type="checkbox"/>	Other: _____

√	<b>Other Sources of Canadian Income</b>
<input type="checkbox"/>	Employment/Self-Employment
<input type="checkbox"/>	Interest & Dividends
<input type="checkbox"/>	Capital Gains
<input type="checkbox"/>	Other: _____

√	<b>Sources of Foreign Income</b>	
<input type="checkbox"/>	Employment/Self-Employment	\$ _____
<input type="checkbox"/>	Pension	\$ _____
<input type="checkbox"/>	Investments	\$ _____
<input type="checkbox"/>	Other: _____	\$ _____

√	<b>Tax Credits</b>
<input type="checkbox"/>	Tuition Credits
<input type="checkbox"/>	Medical Expenses
<input type="checkbox"/>	Canadian Donations
<input type="checkbox"/>	Other: _____

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