

**2023**

**Personal Income Tax Checklist**

**Individual #1 – Gender M      F**

NAME \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

SIN \_\_\_\_\_

Date of Birth (mm/dd/yy) \_\_\_\_\_

Phone # (Cell / Home) \_\_\_\_\_

Canadian/Other Citizenship     Yes     No

Email \_\_\_\_\_

Marital Status:

Married     Single     Common Law

Separated     Divorced     Widowed

**Spouse: - Gender M      F**

NAME \_\_\_\_\_

SIN \_\_\_\_\_

Date of Birth (mm/dd/yy) \_\_\_\_\_

Income \_\_\_\_\_

Email \_\_\_\_\_

Phone # (Cell/Home)

Canadian/Other Citizenship     Yes     No

**Dependent #1 - Gender M      F**

NAME \_\_\_\_\_

SIN \_\_\_\_\_

Date of Birth (mm/dd/yy) \_\_\_\_\_

Net income \_\_\_\_\_

Disability Tax Credit \_\_\_\_\_

Tuition Transfer \_\_\_\_\_

Canadian/Other Citizenship     Yes     No

**Equivalent to spouse (provide a copy of the custody and divorce/separation agreement)**

**Dependent #2 - Gender M      F**

NAME \_\_\_\_\_

SIN \_\_\_\_\_

Date of Birth (mm/dd/yy) \_\_\_\_\_

Net income \_\_\_\_\_

Disability Tax Credit \_\_\_\_\_

Tuition Transfer \_\_\_\_\_

Canadian/Other Citizenship     Yes     No

For additional dependents, please provide the same information as above under the "comments and additional information" section.

**New Trust reporting (please contact us to discuss further, see our attached letter)**

Name, Address, Date of Birth; for all parties  
Details of property involved, however not needed for filing

**PREVIOUS TAX RETURN**

Last year's Notice of Assessment

Reassessments notice(s) received during the year

Deductions/credits

**ADDITIONAL INFORMATION**

**First Time Home Buyer Tax Credit** – Information on Principal Residence purchased

New residential property purchased? GST/HST rebate might be available.

**Did you dispose of your principal residence?** Please provide copy of statement of adjustments, the year acquired, and cost: \_\_\_\_\_

**Marital/Common-law Status Change –**

date of status change \_\_\_\_\_

Was a non principal residence residential property you owned vacant during the year? Underused Housing Tax return and 1% tax may be required.

**Address Change** – Please provide a new mailing address or if your place of residence changed during the year and where your resident was at December 31. \_\_\_\_\_

Would you like to be added to the office of registrars with Elections Canada?                      YES      NO

**CONTACT PREFERENCES**

**PLEASE ADVISE OUR OFFICE** which option you choose to access and submit documents with our office. Please circle your option of choice:

Option 1:            Client Portal

Option 2:            Email

Option 3:            OneDrive

Option 4:            Print outs & held for pickup at office

Option 5:            Print outs and mailed out to you

Please also advise our office if you would like to be unsubscribed from future emails from our office, and what your preferred contact method is.

Preferred contact method: \_\_\_\_\_

## 2023

## Personal Income Tax Checklist

**EMPLOYMENT INCOME**

- T4 for Employment Income
- o If union dues are on your T4 (box 44), we need a letter from your employer saying which union it is for
  - o Please provide amount received in tips if not included on T4
- T4PS for Profit Sharing Income  
Other \_\_\_\_\_

**EMPLOYMENT RELATED EXPENSES**

*Please note the temporary flat rate method deduction of \$2/day in 2022 is not available in 2023.*

**T2200 – Required for employment expenses**

- Travel/Auto – Records of expenses and calculation of Business Mileage  
Moving Expenses – including mileage log and distance  
Home Office Expenses  
Union or Association Dues – Official Tax Receipts TL2 for Transport Employees  
T1223 Clergy Residence Deduction  
Educator school supply receipts (max. \$1,000)  
Mechanic tradespersons tool receipts (max. \$1,000)  
Other Expenses \_\_\_\_\_  
Labour Mobility deduction and related non-taxable allowance

**PENSION, RETIREMENT, ANNUITY INCOME**

- T4A(OAS) for Old Age Pension  
T4A(P) for Canada or Quebec Pension  
T4A for Other Income (including retiring allow.)  
Foreign slips & details (eg. U.S. Social Security)  
T4A(RIF) Registered Retirement Income Fund  
T4RSP Registered Savings income (withdrawal)  
T4P for Pension Income  
Other \_\_\_\_\_

**INVESTMENT INCOME**

- Applicable: YES      NO  
T3 for Trust or Mutual Fund Income  
T5 for Investment Income (interest, term deposits or G.I.C's, Dividends)  
T5013 Partnership Income  
Royalty or other investment income – Details  
Foreign interest or dividends – foreign slips  
T5008 or other information  
Other \_\_\_\_\_

**SALE/EXCHANGE OF INVESTMENTS**

- Stocks, bonds, trust units – Transaction slips/details, broker statements, **statement of unrealized gain/loss on non-registered funds**  
Real Estate and Other Properties – Full Details  
Gifted Properties – Full Details  
Elections in Prior Years(s) – Full Details  
Cryptocurrency transactions  
Prior year Reserves – Full Details  
Other \_\_\_\_\_

**INVESTMENT EXPENSES**

- Money borrowed to earn Investment Income  
Accounting Fees to Report Income (not including tax preparation)  
Investment Counsel and Management Fees  
Other \_\_\_\_\_

**OTHER INCOME**

- T4E for Employment Insurance Benefits  
Repayment of COVID benefits - (SEE APPENDIX A)  
T5007 for Workers Compensation Benefit or Social Assistance  
Social Assistance Payments – Full Details, Slips  
Alimony or Child Support Received – Full Details including divorce agreement  
Scholarships, Bursaries – Details, T4A Slips  
Capital Gains/Losses Details  
Other \_\_\_\_\_

**SELF EMPLOYMENT (CONTACT US FOR SPREADSHEET)**

- Record of all Revenue & Expenses (Includes AirBnB, Uber, etc.)  
T5018 (for subcontractor payments)  
Assets purchased, sold during year – Full details (Including Air Quality Improvement Expenditures)  
Salary paid to spouse – Details of work done  
Inventory – Closing Cost  
GST filing requirement details  
Any Special Elections in Prior Years

**Any internet business activities? Please indicate website address, and % of income from it**

**COMMISSION RELATED EXPENSES**

- Travel/Auto – Records of Expenses and calculation of Business Portion of Use  
Sales Expenses – Full Details  
T2200 – Office in Home, details of area used and cost of home, including interest, taxes (Note: Mortgage interest not deductible as employment expense)

**RENTAL INCOME (CONTACT US FOR SPREADSHEET)**

- Records of all Revenue & Expenses  
New Properties – Purchase agreements & details  
Rental of Part of Residence – Details of Split  
Change of use of Rental Property – Date & Details  
Sale of Rental Property – Sale and Purchase Details  
Mortgage interest details  
**Vacation property rental details**

**FARMING INCOME (CONTACT US FOR SPREADSHEET)**

- Records of all Revenue & Expenses  
New Properties/assets – Purchase agreements & details  
Value of Purchased Livestock on hand at December 31?  
Value of Raised Livestock on hand at December 31?

## 2023

## Personal Income Tax Checklist

## FOREIGN PROPERTY

T1135 to be completed if property owned (includes cash, stocks, trusts, partnerships & real estate) **COST** more than \$100,000. Required details include description of property, related country, maximum cost in the year, and cost at year-end, capital gain/loss per each particular country.  
T1134 may need to be completed if ownership interest in a foreign affiliate is held during the year.

## ADDITIONAL DEDUCTIONS AND CREDITS

T2202, T111A, T611D for Tuition Fees (yourself/spouse or dependents)

Canada Training Credit (\$250/year)

Interest Statement for Student Loans

Digital News Subscription Credit

RRSP Contribution Receipts (including stocks/bonds rolled over into RRSP) – Official Tax Receipts  
RRSP – Home Buyers' Plan and Lifelong Learning Plan withdrawals and repayments  
FHSA (First home savings account) - Contribution Receipts – Official Tax Receipts

Alimony or Separation Allowance Paid – Details and copy of agreement

Child Care Expense Receipts

Caregiver Tax Credit - Parents, in-laws, grandparents or infirm dependent relative over 65 living with you – Full details \_\_\_\_\_

Multigenerational home renovation tax credit – for an eligible dwelling for elderly family members

Charitable Donation Receipts

Political Donation Receipts

Unused prior year Donations

Loss on shares of or loans to private company (ABIL)

Volunteer Firefighters or Search and Rescue Certification (if over 200 hours)  
Tools acquired by "Eligible Apprentices Tradespersons" (T2200 signed by Employer)

Northern Residents Deduction – Full Details  
Oil & Gas, Mining Investments – Full Details

## PLEASE NOTE

Please indicate if you are an indigenous person.

Are you a U.S. citizen, Green card Holder, or were you or your parents born in the United States? You may have U.S. filings obligations.

## MEDICAL EXPENSES

Medical and Dental Expenses (Including Private Health Plan Premiums Paid and Qualifying Travel)

Your pharmacy can provide you with a summary of all of your prescription purchases for the year upon request. (this is the most efficient method)

Disability Support Expenses (Form T2201 qualifying for Disability Tax Credit if you or dependent disabled) Please note Type 1 Diabetes now automatically qualifies for the Credit with T2201.

Home accessibility expenses (Adults over 65 or those eligible for the disability tax credit or disabled persons)

Adoption, Fertility and Surrogate Medical Expenses

If you need medical intervention to conceive a child, you may be eligible to claim certain expenses even if you do not have a medical condition (this includes adoption, surrogacy and fertility expenses as well)

Please note, in Alberta, massage therapy expenses are not claimable for tax purposes.

## DIRECT DEPOSIT INFORMATION

Direct Deposit Form completion:

- Online – If you are registered for "My Account" you can sign up for direct deposit now.
- MyCRA App - Similar to "My Account"
- Financial institution - Direct setup at your bank
- Telephone – Please call 1-800-959-8281.

Comments or Additional Information:

# 2023

## Appendix A

**CANADA EMERGENCY BENEFITS**

Please provide any details regarding the repayment of any of the benefits in the year. You may be able to claim a deduction.