



2023 Personal Income Tax Return Checklist

Please complete and supply us with this checklist together with your tax information

Personal Information Returning client, no new personal information

LAST NAME	FIRST NAME	DATE OF BIRTH (MM/DD/YY)	SIN #
STREET ADDRESS			HOME #
CITY	PROVINCE	POSTAL CODE	WORK #
EMAIL ADDRESS		MARITAL STATUS	CELL #

Spouse (if applicable) Returning client, no new personal information

LAST NAME	FIRST NAME	DATE OF BIRTH (MM/DD/YY)	SIN #
STREET ADDRESS			HOME #
CITY	PROVINCE	POSTAL CODE	WORK #
EMAIL ADDRESS		MARITAL STATUS	CELL #

If you have dependents, please complete the above information for each dependent on a separate sheet

- 2022 Notice of assessment/reassessment (if not already provided to us)
- 2023 tax installments paid summary, if applicable
- Amount of any contributions to or distributions from, or loans to or from foreign trusts in 2023
- Do you authorize CRA to provide information about you to Elections Canada? Yes No
- If new personal tax client, copy of 2020 – 2022 returns and notices of assessment, carry forward details such as donations, losses, RRSP contributions, etc., and signed copy of Authorize a Representative (available upon request)



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Income Slips and Documentation

- All income, support and benefits received (T4A or T4E slips)
- Income slips (T3, T4, T4A, T4AP, T4E, T4RSP, T4RIF, T4AOAS, T4PS, T5, T5007, T5008, T5013, T5018, RC62, others)
- Stock option/benefit plan statements from employer
- Annual mutual fund statements for all funds held outside your RRSP or RRIF
- Details of all non-RRSP and non-RRIF investment disposals during 2023, including historical information to support original purchase price (cost base) or a "realized gain/loss" report from broker
- Details of investments that were subject to 1994 capital gains election, if any
- Do you hold investments or investment real estate property outside Canada which originally cost in excess of \$100,000 CDN (triggering the need for T1135 Foreign Income statement)?** YES NO
For securities held in an account with a Canadian broker, please provide the foreign income report
- Did you sell your principal residence in 2023?** YES NO If yes, please provide details of original purchase and sale and number of years designated as principal residence _____ years
- Did you open a First Home Savings Account (FHSA) in 2023? YES NO

Rental Income

- Full address including postal code, number of rental units
- Revenue and expenses, including mortgage interest (not principal)
- Percentage of personal use, if applicable
- If bought or sold in 2023, provide purchase/sale agreement, statement of adjustments, reporting letter from lawyer and allocation of value between land and building.

Self-Employment Income

- Revenue for the year and expenses (see below), on an accrual basis
- FIT or MICROFIT details and contract
- HST return(s), if applicable for the year. Do you want us to prepare and file this return YES NO
If yes, please provide HST number and access code/HST return



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Expenses (Self-employment, Employment or Commission)

- T2200 – conditions of employment form signed by employer
- All non-reimbursed expenses: travel, promotion, conferences, dues, telecommunications, supplies, meals and entertainment, etc.
- Automotive: kilometers used for business and total kilometers driven for year, gas, repairs and maintenance, insurance, license, lease costs, loan interest, purchase/sale details if bought/sold in 2023
- Office-in-home: percentage used for business, rent, property taxes, condo fees, utilities, insurance, repairs and maintenance

Deductions

- RRSP contribution receipts, including January and February 2024 receipts
- FHSA contribution receipts for 2023
- Childcare, with supporting receipts and SIN of caregiver(s)
- Adoption costs
- Union/membership dues
- Moving expenses (contact us for detailed list)
- Alimony/support payments, with copy of agreement if first year claim
- Legal fees to collect salary, alimony or support
- Accounting fees, investment counsel fees
- Investment interest expense
- Tax shelter deductions – tax slips and tax reporting package
- Trades people's tools
- Clergy residence deduction
- Split pension income, if advantageous?**
 - YES
 - NO

Tax Credits

- Charitable and political donation receipts
- Medical/dental expenses (**get annual printout from pharmacy, dentist**)
- Attendant Care expenses
- Expenses for care of dependent relative(s)
- Tuition fee receipt (T2202), with dependent's income and signature(s)
- Disability credit form (T2201) for self or dependent for first-time claims
- Student loan interest statement
- 2023 rent/property tax information if eligible for Ontario tax credits
- Indicate if eligible for first-time home buyer credit for 2023
- Indicate if family member (other than child) resides with you or is dependent on you
- Receipts for home renovations to improve accessibility (seniors or disabled persons)