**In order to assist us in preparing your 2023 Personal Income Tax return(s) kindly complete the following:**

**Personal Information:**

Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Marital Status:**

[ ]  Same as last year

[ ]  Changed as of *(date):* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

New marital status *(if applicable)*:

Married [ ]  Common-law [ ]

Separated [ ]  Divorced [ ]

Widowed [ ]  Single [ ]

**Address:** [ ]  Same as last year

 [ ]  New *(please complete)*:

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Contact Information:**

Home Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Business Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Cell Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**E-file Authorization Signing**  [ ]  electronic [ ]  paper

**Personal Tax Return** [ ]  electronic (PDF) [ ]  paper

**Dependant Information:**

[ ]  Same as previous year

[ ]  New *(please complete chart)*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Name** | **Date of Birth** | **SIN** | **Relationship** | **Net Income** | **Return to Be Prepared** |
|  |  |  |  |  | [ ]  Yes[ ]  No |
|  |  |  |  |  | [ ]  Yes[ ]  No |
|  |  |  |  |  | [ ]  Yes[ ]  No |
|  |  |  |  |  | [ ]  Yes[ ]  No |

|  |  |  |
| --- | --- | --- |
|  | Are you a Canadian Citizen? | [ ]  Yes [ ]  No  |
|  | If yes, do you authorize Canada Revenue Agency to give your name, address, date of birth and citizenship to Elections Canada to update the National Register of Electors? | [ ]  Yes [ ]  No  |
|  | Did you own foreign property at any time in 2023 with a cost of over $100,000 CDN? *(If yes, attach details of such property)* | [ ]  Yes [ ]  No  |
|  |  |  |

***Continued on Reverse…***

**Please include the following information for each taxpayer:**

*(If applicable, please check box () if the information is included*)

**All income information slips**

 Employment [ ]  **T4** [ ]  **T4A**

COVID-19 Support/Repayments

*(CRB, CRSB, CRCB)* [ ]  **T4A**

Partnership income [ ]  **T5013**

 Pension payments from employer [ ]  **T4A**

 Interest and dividends [ ]  **T5**

 Mutual fund and other trusts [ ]  **T3**

 Old Age Security [ ]  **T4A (OAS)**

 Canada Pension Plan [ ]  **T4A (P)**

 Employment Insurance [ ]  **T4E**

 Income from RRSP [ ]  **T4RSP**

Income from RRIF[ ]  **T4RIF**

Purchase and sale of securities [ ]  **T5008**

 Social assistance, WSIB [ ]  **T5007**

 Other (specify) [ ]  \_\_\_\_\_\_\_\_\_

**All official receipts:**

RRSP contributions, ***including
 first 60 days of 2024*** [ ]

 Charitable donations [ ]

 Political donations [ ]

 Professional dues [ ]

\*\***NEW -First Home Savings**

 **Account Statement** [ ]  **T4FHSA**

Disability tax credit certificate [ ]  **T2201**

Tuition and enrollment certificate [ ]  **T2202**

*If receipt is from a dependant, please have dependant sign in appropriate place on the form (reverse). If we are not completing dependant’s return, please complete the income portion of the form*

[ ]  **Self-employment income and expenses** (*Include HST information, if applicable)*

[ ]  **Rental property income and expenses** (*Include HST information, if applicable)*

[ ]  **Details of employment expenses** *(Employees must include form T2200 signed by their employer)*

**Other items:**

[ ]  **Support/alimony payments** *(Please include amount paid or received, the name, address and SIN of payee or recipient, and copy of the support agreement)*

[ ]  **Child care expenses** *(Please include receipts)*

[ ]  **Moving expenses** *(Please include receipts)*

[ ]  **Medical expenses** *(Please include official receipts showing payment)*

[ ]  **Property taxes or rent paid in the year** *(Please include the number of months at each location, the address of each location and to whom the amounts were paid))*

[ ]  **Home accessibility expenses** *(For seniors and the disabled. Please contact us for more information.)*

[ ]  **Multigenerational home renovation tax credit expenses** *(Please contact us for more information.)*

[ ]  **Carrying charges and interest paid to earn income from investments**

[ ]  **Other Credits:** *Interest paid on student loans, tradesperson’s tools expenses, &/or teaching supplies expenses (for educators only)*

[ ]  **Details of disposition of stocks, bonds and mutual funds.** *(Please include investment broker monthly statements and year end summaries provided by broker)*

[ ]  **Disposition of real estate including your principal residence** *(Please include proceeds of sale, sale date, and ownership. For sales of property other than a principal residence please also include purchase date and original cost)*

[ ]  **Direct Deposit** *(Please include a void cheque for direct deposit if desired, unless already registered)*

[ ]  **Instalment payments made during the year** *(Please include year end statement from CRA)*