

2023 Personal Income Tax Checklist

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

Personal Information:

Name _____
 Name _____
 Name _____
 Name _____

Address: Same as last year
 New (please complete):

Marital Status:

Same as last year
 Changed as of (date): _____

New marital status (if applicable):

Married Common-law
 Separated Divorced
 Widowed Single

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
					<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> 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? Yes No
 (If yes, attach details of such property)

Continued on Reverse...

2023 Personal Income Tax Checklist

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)