



PERSONAL INCOME TAX RETURN CHECKLIST - 2023

Name: Email:
 Address: Phone:
 Birthdate: Marital status:
 (Single, Married, Commonlaw, Widowed, Divorced, OR Separated)

If we're NOT preparing the tax return of your spouse/partner, please provide the following:
 Spouse name: Spouse birthdate: Spouse Net Income:

Children

Name & relationship (son, daughter, child, etc)	Birthdate	Net income \$	Disability?	Child care? Provide provider name and amount
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Other dependents? Provide details

	YES	NO
Are you a Canadian citizen?	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box
Do you authorize Canada Revenue Agency (CRA) to provide your name, address, and date of birth to Elections Canada for the National Register of Electors?	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box
Please let us know if you DO NOT want to receive information about organ donation		
Did you dispose of your principal residence? Although non-taxable, it must be reported to CRA. Provide details of property disposed of: sale price, address, year acquired	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box
<input type="text"/>		
Did you dispose of a housing unit (includes a rental, or right to purchase a property)?	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box
Are you the trustee of a trust? There are new trust reporting requirements, including for bare trusts. Please contact us for more details if you think you may be affected	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box
Did you own/hold foreign property any time in the year with a total cost more than C\$100,000? Or did you own an interest in a foreign affiliate at any time in 2023?	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box

	YES	NO	
INCOME			IF YES PLEASE PROVIDE:
Salary/employment income	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box	T4 slips
Pension/annuity income	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box	T4A / T4A(P) / T4A(OAS) slips
Foreign pension income	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box	Country, type (company/government), currency <input type="text"/>
RRIF/RRSP/FHSA income	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box	T4RIF / T4RSP / T4FHSA slips
Interest/dividend/investment income	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box	T5, T3, T5013 slips, details of other investment income
Self-employment income	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box	See template on our website
Rental income	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box	See template on our website
Alimony/taxable child support	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box	Details <input type="text"/>
Capital gains/losses from sale of stocks (outside of RSP/RIF/TFSA), real estate, etc	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box	Realized Gain/Loss report for each brokerage account Other items: provide cost, purchase date, sale proceeds, sale date
Other income (Tips, WSIB, executor fees, EI, social assistance, etc)	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box	Details <input type="text"/>

YES NO

DEDUCTIONS AND CREDITS	YES	NO	IF YES PLEASE PROVIDE:
RRSP contributions -repay Home Buyers Plan (HBP) or LLP?	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box	Tax receipts - including first 60 days of current year
FHSA (First Home Savings) contributions	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box	Tax receipts - first 60 days of the current year is EXCLUDED
Union or professional dues	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box	Tax receipts (if not listed on T4)
Child care/summer camp for you to work or attend school	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box	Provide details above (name, SIN, amount paid) Overnight camp? Include details separately
First-time home buyer tax credit	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box	Details <input style="width: 150px;" type="text"/>
Moving expenses	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box	Contact us - must be to move at least 40km closer to work
Alimony or deductible child support pursuant to written agreement or court order	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box	Provide date of agreement, alimony amount, recipient details <input style="width: 150px;" type="text"/> <input style="width: 150px;" type="text"/>
Investment income expenses	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box	Details (interest expense, advisor fees, etc.)
Employment expenses (includes work-from-home expenses)	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box	See template on our website Completed by employer: T2200 or TL2 (transport)
Eligible Educator School Supply Credit Tradesperson Tool Expenses	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box	Teacher/ECE: employer signed form Provide details <input style="width: 150px;" type="text"/>
Disability tax credit for self	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box	
Student loan interest	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box	Tax receipts
Tuition/training fees for self	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box	T2202/T2202A
Tuition fees of dependent which student wishes to transfer	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box	T2202/T2202A signed by student Copy of student's tax return, student must claim some/all of credit if income sufficient
Vol. Firefighter/Search & Rescue	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box	Details (must be 200 + hours in year)
Home Accessibility Tax Credit	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box	Receipts for renovations to increase safety/functionality of individual aged 65+ or with Disability Tax Credit
Multigenerational Home Reno Tax Credit	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box	Receipts for renovations to construct a secondary suite for an eligible person (age 65+, or 18+ with DTC)
Medical expenses not reimbursed (usually must exceed \$2635 or 3% of net income if less)	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box	See template on our webiste Receipts for medical expenses and reimbursements. Receipt for medical plan premiums
Charitable donations	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box	Tax receipts
Political contributions	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box	Tax receipts
Property taxes/rent paid	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box	Amount paid, municipality/landlord, address <input style="width: 150px;" type="text"/>
Tax instalments paid Total paid for 2023 <input style="width: 50px;" type="text"/>	<input type="checkbox"/> Check Box	<input type="checkbox"/> Check Box	

OTHER
More tax information to come? If yes, please explain <input style="width: 500px;" type="text"/>
Anything else we should know? <input style="width: 500px;" type="text"/>
<input style="width: 500px;" type="text"/>

As the information in this checklist does not address all income tax matters and is abbreviated for simplicity, please contact us for further information, details and clarification. Do not distribute or reproduce without written permission of Lisa Ritchie CPA.
