



PERSONAL INCOME TAX RETURN CHECKLIST

Name: _____ Spouse/Partner Name: _____
 Email: _____ Email: _____
 Phone: _____ Phone: _____

If any of the following information has changed (or if you are a new client) please provide the following:

Address: _____

Self: SIN: _____ Birthdate: _____

Spouse/Partner: SIN: _____ Birthdate: _____ Net Income: _____
 (if we're not completing spouse's return)

Marital Status: Single Married Commonlaw Widowed Divorced Separated

Children: Name Relationship Birthdate Net Income Disabilities Child Care

Other dependents?

Are you a Canadian citizen?	Yes	No
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?	Yes	No
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	Yes	No
Did you own/hold foreign property any time in the year with a total cost more than C\$100,000?	Yes	No
<i>If we are doing tax returns for other family members - are above responses the same?</i>	Yes	No

INCOME			IF YES PLEASE PROVIDE:
Salary/employment income	Yes	No	T4 slips
Pension/annuity income	Yes	No	T4A / T4A(P) / T4A(OAS) slips
Foreign pension income	Yes	No	Country, type (company/government), currency
RRIF/RRSP income	Yes	No	T4RIF / T4RSP slips
Interest/dividend/investment income	Yes	No	T5, T3, T5013 slips, details of other investment income
Self-employment income (ie rental, business)	Yes	No	Details of income and expenses for period HST remittance returns for period
Alimony/taxable child support	Yes	No	Provide details
Capital gains/losses from sale of stocks, mutual funds, real estate, etc	Yes	No	Realized Gain/Loss report for each brokerage account Other items: provide cost, purchase date, sale proceeds, sale date (do not provide if in registered account - RRSP/TFSA/RRIF/etc)
Covid relief income	Yes	No	Personal - T4A or T4E slips Business - provide details
Other income	Yes	No	Details/slips (Tips, WSIB, executor fees, EI, social assistance)

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DEDUCTIONS AND CREDITS			IF YES PLEASE PROVIDE:
RRSP contributions	Yes	No	Tax receipts - including first 60 days of current year
-repay Home Buyers Plan (HBP) or LLP?	Yes	No	Amount of any HBP or LLP repayment and CRA statement
Ont Staycation Tax Credit - 2022 only	Yes	No	Complete chart provided - do not provide receipts
Union or professional dues	Yes	No	Tax receipts (if not listed on T4)
Child care/summer camp for you to work or attend school	Yes	No	Details (name, SIN, amount paid) Overnight camp? Include details separately
First-time home buyer tax credit	Yes	No	Details
Moving expenses	Yes	No	Details - must be to move at least 40km closer to work
Alimony or deductible child support pursuant to written agreement or court order	Yes	No	Date of agreement _____ Alimony \$ _____ Deductible child support \$ _____ To whom? Require name, address, SIN
Investment income expenses	Yes	No	Details (interest expense, advisor fees, etc.)
Employment expenses	Yes	No	Details of non-reimbursed expenses
-employer registered for HST?	Yes	No	Completed by employer: T2200 or TL2 (transport)
Eligible Educator School Supply Credit	Yes	No	Teacher/ECE: employer signed form
Work at home due to covid	Yes	No	Provide the # days you worked at home in 2022 due to covid
-employees who worked at home more than 50% of time for 4+ consecutive wks			Provide separate # for each spouse, if applicable
-exclude days you did not work			No T2200 required. Cannot claim if fully reimbursed by employer Contact us if you had substantial work-from-home expenses
Disability tax credit for self	Yes	No	T2201 completed by appropriate health care provider
Support any relatives?	Yes	No	Details (relationship, birthdate, net income, etc.)
Student loan interest	Yes	No	Tax receipts
Tuition/training fees for self	Yes	No	T2202/T2202A
Tuition fees of dependent which student wishes to transfer	Yes	No	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	Yes	No	Details (must be 200 + hours in year)
Home Accessibility Tax Credit	Yes	No	Receipts for renovations to increase safety/functionality of individual aged 65+ or with Disability Tax Credit
Medical expenses not reimbursed (usually must exceed \$2479 or 3% of net income if less)	Yes	No	Receipts for medical expenses and reimbursements. Receipt for medical plan premiums Please provide total also.
Charitable donations	Yes	No	Tax receipts
Political contributions	Yes	No	Tax receipts
Property taxes/rent paid	Yes	No	Amount paid, municipality/landlord, address
Tax instalments paid	Yes	No	Receipts and/or latest statement of account from CRA

OTHER			IF YES PLEASE PROVIDE:
More tax information to come?	Yes	No	Details
<i>Please provide your prior year Notice of Assessment (and your prior tax return if you are a new client)</i>			

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