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*denotes professional corporation

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2023 PERSONAL TAX CHECKLIST

Personal information							
First name		Last name					
Street address		City	ity			Province	
Postal code	Birthdate: yyyy /mm / dd		SIN#				
Marital Status:	Canadian citizen			American citizen			
Cell phone:		Home phone:	•				
Email:		Has your name changed in 2023? Yes \square No \square					
Completing return for spouse/	'partner? Yes □ No □	lf no, pl	ease pr	rovide Net Income:	\$ AMOUN	<u>T</u>	
Spouse/Partner First Name		Last Name					
Birthdate yyyy / mm / dd		SIN#					
Email address:							
Dependents (children or senio	r parent living with you	(use notes se	ction if	more space need	led)		
First Name		Last Name					
Birthdate yyyy / mm / dd		SIN#					
Email address:		Relationship:					
First Name		Last Name					
Birthdate yyyy / mm / dd		SIN#					
Email address:		Relationship:					
First Name		Last Name					
Birthdate yyyy / mm / dd		SIN#					
Email address:		Relationship:					
E'art Nie are		LastName					
First Name		Last Name					
Birthdate yyyy / mm / dd		SIN#					
Email address:		Relationship:					
Please answer all the following		high agat mara	than C1	100 000 CDN2	V □	NI- 🗆	
Do you own investments or property outside of Canada, w			man \$	100,000 CDN?	Yes □	No□	
Did you sell any real estate in 2023? This includes principa		ai residence			Yes □	No□	
Were you a first-time homebuyer in 2023?					Yes □	No□	
Are you require to file an underused housing tax for the 2023 year		2023 year?			Yes □	No□	
Did you purchase any new investments?					Yes □	No□	
If you invested, did you borrow money to do so?		Yes □	No□				
Did you change investment advisor?				Yes □	No□		
Have you had any additions to your family this year? Any		new born child	ren?		Yes □	No□	
Did elderly family members moved in with you?					Yes □	No□	

Has your marital status changed?	Yes □	No□					
Have you started residing with a partner or stopped living with one?	Yes □	No□					
Have your children started post-secondary school? Did they moved to attend school?	Yes □	No□					
Have there been any changes in your health that we should know about? This changes may	Yes □	No□					
qualify you for disability tax credit							
Do you have any issues with mobility, sight or hearing?	Yes □	No□					
Did you change jobs during the year?	Yes □	No□					
Did you retire in the year?	Yes □	No□					
Do you want to provide your address and information to Elections Canada?	Yes □	No□					
Additional Notes and Questions – Please provide details if you have had family changes/dates (birth, marital status, death). Write here all your questions and we will get in touch with you once we check your information and documents.							
For self-employed individuals / sole proprietors							
Would you like us to summarize your expenses? — Yes, please summarize (additional)	e us to summarize your expenses? Yes, please summarize (additional cost would apply						
☐ No, I've already summarized							
Is your business or rental property registered for HST/GST? Yes □ No□ Filing period: Regular	Quick	<					
Would you like us to complete your HST/GST return? — Yes (please include required docur	☐ Yes (please include required documents)						
□ No (please provide copy of HST/G	□ No (please provide copy of HST/GST filed)						

THESE ARE SOME SLIPS THAT MAY APPLY TO YOU. IF THEY DO PLEASE PROVIDE US WITH A COPY.					
Personal Income	Investment Income				
T4, T4A – Salaries and employment	T3, T5, T4S – Interest and Dividends				
Other employment benefits	T5008 – Statement of Security Transactions				
T4A (P) – Canada Pension Plan benefits	Interest on Tax Refunds				
T4A (OAS) – Old Age Security benefits	T600 – Canada Savings Bonds				
T4A – Other pension or superannuation	T3 – Mutual Fund Income				
T4RSP – RRSP income	Foreign income				
T4RIF – RRIF income	Annuities				
T4E – Employment Insurance benefits	Rental income (full details required)				
T5007 – WCB benefits/social services benefits	Summary of investment contract holdings				
T1137 – Home Buyers Plan	T5013 – Limited partnership income (loss)				
T4RCA – retirement income	Capital gain/losses (full details required)				
Other Income	Business Earnings				
Alimony received	Self-employment earnings (details required)				
Child support received	Farming/fishing earnings (details)				
Scholarships/bursaries	Professional earnings (details)				
Other – specify: OTHER INCOME SOURCE	Self-employment commissioned earnings (details)				
Refundable & Non-refundable Credits	Other Deductions				
Married amount – spouse's net income \$ AMOUNT	RRSP				
Equivalent to married amount (full details required)	Union/professional dues				

Disability deductions	Alimony paid		
T2202 – tuition fees	Child support paid		
Dependent Tuition Credit or Net Income \$ AMOUNT	Interest paid on student loans		
Medical receipts	Interest and carrying charges on investments		
Charitable donations	Investment counsel and accounting fees		
Attendant care expenses	Employment expenses		
·	(details required, form T2200 or T2200 S)		
Limited partnership losses of other years	Deductible legal fees		
Education Coaching Amount (BC)	Child care expenses		
Eligible Educator School Supply Tax Credit	Moving expenses (details required)		
Volunteer Firefighter Credit	TL2 – Claim for boarding and lodging		
Search and Rescue Credit	FHSA (First time home savings account)		
	,		
	Other items		
Additional documents	Political contribution receipts		
Restricted farming losses carry forward	Allowable business investment loss		
Prior year Notice of Assessment	Employment insurance benefit repayments		
Installment payments for current year	Dependent data (GST credit and child tax benefit)		
Details of foreign property or investments held	Declaration of conditions of employment		
Capital and non-capital losses carry forward	Loss carry forward information		
· · · · · · · · · · · · · · · · · · ·	First time homebuyer in 2018		
	Sale of principal residence in 2018		

IF THIS IS YOUR FIRST YEAR FILING WITH US, PLEASE PROVIDE A COPY OF YOUR PREVIOUS YEAR'S TAX RETURN.

Additional Notes and Questions – Write here all your questions and we will get in touch with you once we check your information and documents.