

## 2023 PERSONAL TAX CHECKLIST

Personal information		
First name	Last name	
Street address	City	Province
Postal code	Birthdate: yyyy / mm / dd	SIN #
Marital Status:	Canadian citizen <input type="checkbox"/>	American citizen <input type="checkbox"/>
Cell phone:	Home phone:	
Email:	Has your name changed in 2023? Yes <input type="checkbox"/> No <input type="checkbox"/>	
<b>Completing return for spouse/partner? Yes <input type="checkbox"/> No <input type="checkbox"/></b> If no, please provide <b>Net Income: \$</b> <u>AMOUNT</u>		
Spouse/Partner First Name	Last Name	
Birthdate yyyy / mm / dd	SIN #	
Email address:		
Dependents (children or senior parent living with you) (use notes section if more space needed)		
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:	
First Name	Last Name	
Birthdate yyyy / mm / dd	SIN #	
Email address:	Relationship:	
Please answer all the following questions		
Do you own investments or property outside of Canada, which cost more than \$100,000 CDN?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Did you sell any real estate in 2023? This includes principal residence	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Were you a first-time homebuyer in 2023?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are you require to file an underused housing tax for the 2023 year?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Did you purchase any new investments?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If you invested, did you borrow money to do so?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Did you change investment advisor?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have you had any additions to your family this year? Any new born children?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Did elderly family members moved in with you?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Has your marital status changed?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have you started residing with a partner or stopped living with one?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have your children started post-secondary school? Did they moved to attend school?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have there been any changes in your health that we should know about? This changes may qualify you for disability tax credit	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Do you have any issues with mobility, sight or hearing?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Did you change jobs during the year?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Did you retire in the year?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Do you want to provide your address and information to Elections Canada?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

**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?	<input type="checkbox"/> Yes, please summarize (additional cost would apply)
	<input type="checkbox"/> No, I've already summarized
Is your business or rental property registered for HST/GST? Yes <input type="checkbox"/> No <input type="checkbox"/>	Filing period: Regular Quick
Would you like us to complete your HST/GST return?	<input type="checkbox"/> Yes (please include required documents)
	<input type="checkbox"/> 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.**

<b>Personal Income</b>	<b>Investment Income</b>
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)
<b>Other Income</b>	<b>Business Earnings</b>
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)
<b>Refundable &amp; Non-refundable Credits</b>	<b>Other Deductions</b>
Married amount – spouse's net income \$ AMOUNT	RRSP
Equivalent to married amount (full details required)	Union/professional dues

