



2023 Personal Tax Checklist

The Personal Tax Checklist is provided to assist you in collecting the information we require to prepare your personal income tax return. Please send us your information electronically in PDF format – pictures from your phone are difficult to work with. Most phones can scan documents natively, or through third-party applications. If you are worried about security when sending information electronically, we can set-up a secure portal through Intuit Link for you to upload your documents to. Please contact us to set this up for you.

Instructions for this Checklist

If an item is applicable to you, please check the designated box and ensure you send us the required information/slip/receipt with the rest of your tax information.



2023 Personal Tax Checklist

Section 1: Personal Information

	Name	SIN	Date of Birth
Taxpayer			
Spouse/Partner			
Dependants: Name / Relationship			
1.			
2.			
3.			
4.			
If your information changed or you moved in 2023 (or are a new client), enter details:			
Street Address			Apt #
City			Province
Postal Code			Country
Home Tel			Cell
Email			
Marital Status			
<input type="checkbox"/>	Married	<input type="checkbox"/>	Common-Law
<input type="checkbox"/>	Widowed	<input type="checkbox"/>	Separated
<input type="checkbox"/>	Divorced	<input type="checkbox"/>	Single
Did your marital status change during the year?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
Date of Change			
Do you or members of your family have a disability?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
If yes, do you have a completed Form T2201?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
Did you immigrate/emigrate to/from Canada this year?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
If yes, provide date of entry/departure			
Provide details of any foreign income tax returns you may need to file, if applicable			
Provide details of any work outside of Canada in 2023, if applicable			



2023 Personal Tax Checklist

Section 2: Change in Personal/Financial Situation

Did you have any children during the year?	Yes	No
Date of Birth		
Did you purchase a home as a "first time" buyer?	Yes	No
Did the taxpayer become deceased during the year?	Yes	No
Date of Death		

Section 3: Elections Canada

Do you authorize the CRA to provide your name, address, and date of birth to Elections Canada to update their information?	Yes	No
--	-----	----

Section 4: Foreign Reporting

Did you own or hold foreign property with a total cost of more than CDN \$100,000 at any time during the year?	Yes	No
Did you own or hold foreign property with a total cost of more than CDN \$250,000 at any time during the year?	Yes	No
Did you transfer to/receive from a foreign trust or a foreign corporation any property or funds?	Yes	No
Did you own foreign investments/assets costing in aggregate of CDN \$100,000 or more during the year?	Yes	No
Did you own foreign investments/assets costing in aggregate of CDN \$250,000 or more during the year?	Yes	No
Did you, either alone or together with a related person, own 10% or more of the equity of a foreign corporation?	Yes	No

If you answered yes to any of the above questions, a foreign reporting information return is **required**.

Foreign property includes shares of foreign corporations; interests in foreign trusts; real estate outside Canada; foreign mutual funds; precious metals held outside Canada; funds in foreign bank accounts; and foreign bonds. Foreign property **does not include** personal use property (e.g. a vacation home); foreign property held in RRSP, RRIF, TFSA, or Canada mutual funds; and shares in foreign Affiliates (T1134).

Failure to file a T1134 or T1135 by the due date can result in substantial penalties.



2023 Personal Tax Checklist

Section 5: Prior Year Tax Return

Sent a copy of 2022 NOA (if not already provided)	Yes	No
Sent a copy of any other correspondence	Yes	No
Are you a new client?	Yes	No
Please attach last 3 returns and NOAs	Yes	No

Section 6: Income and Expenses

Income	Deductions
T4 – Employment Income	RRSP Contribution
T4A – Other Employment Income	Home Buyer’s Plan
T4E – EI & Other Benefits	Spousal Support Paid: \$
T4PS – Profit Sharing Plan	Spousal Support Received: \$
T4A(OAS) – Old Age Security	Child Support Paid: \$
T4A – Pension, Other Income	Child Support Received: \$
T4A(P) – CPP, Disability Benefits	Childcare Expenses
T4RIF/T4RSP – RRSP Income	Adoption Expenses
T3 – Trust Income	Accounting and Legal Fees
T5 – Investment, Interest Income	T2202 – Tuition for Self/Dependents
T5013 – Partnership Income	Interest on Student Loans
T5008 – T-Bill Interest	Medical Expenses
T600 – Ownership Certificates	Charitable Donations
Foreign Income	Political Contributions
Rental Income	Union Dues
Capital Gains	HST Rebate: \$
T2200 – Employment Expenses	
Other Employment Expenses	
Self-Employment Income	
Interest on Investment Loans	



2023 Personal Tax Checklist

Section 7: Income Tax Instalments Paid

Federal Instalments Paid:	\$
---------------------------	----

Section 8: Ontario Trillium Benefit

Please indicate if you paid any property tax and/or rent in Ontario this year.

Property Tax:	\$	Rent:	\$
---------------	----	-------	----

Reminders

This tax checklist provides us with the basis to prepare your personal tax return. We may require more information from you and may require receipts/slips.

We do not send any documentation to the Canada Revenue Agency when we file your return. The CRA is continuing to increase their audit and review activity. You are required to present receipts as requested for up to seven years. We do not keep copies of your receipts on file. A review is typically a straightforward process that can be completed by the taxpayer. If you require our assistance, an additional charge at the rate determined at the time of the audit or review applies.

Payment for the preparation and filing of your return is due upon delivery of your return. We do not file returns until your payment has been received. We accept cash, cheque, or e-transfer for payments. A credit card can be used with an administration fee which will be communicated to you prior to the processing of your payment.

Payments to the CRA can be sent electronically. This can be done online through the CRA website, or through your online banking. Payments made in-person through a financial institution or by mail must include a remittance voucher. Please ask us to prepare this for you.