ESG Chartered Professional Accountants 2023 Personal Tax Return Checklist

Please use this checklist as a guide in preparing your documentation for the preparation of your personal tax return. It is important to prepare and file a complete tax return to avoid penalties later in the year.

Reminde	r to fill out UHT	Form: if application	able must be	filed by A	oril 30)/2024
	Name		SI	Ν	Da	ate of Birth
Taxpayer						
Spouse						
Address					assis UHT help fo fee, pl	If needing tance with the Form, we can or an additional lease notify by ch 10/2024**
Email Taxpayer						
Email Spouse						
Taxpayer Mobile Phone Number						
Spouse Mobile Phone Number						
Home Phone						
Tax Return	🗆 Email 🛛 Pr	int				
Marital Status: □ I If your marital status	Married			ed 🗆 Div	orced	□ Widowed
If eligible, do you wis	h to split pension in	come with your spou	use?	□ Yes		□ No
Dependents						
Name	Relationship	Date of birth	SIN	Disabil	ity?	Income
i	1					1

Personal Information <u>*Reminder to fill out UHT Form: if applicable must be filed by April 30/2024*</u>

Did you receive or make support payments during the year?

Residence

What was your Province or Territory of residence on December	31 st , 2023?		
Did you immigrate to Canada or emigrate from Canada during t	he year?	□ Yes	□ No
If yes, provide date of entry into Canada	or date of departure		

□Yes □No

Elections Canada

Liections Canada						
Are you a Canadian citizer	?		□ Yes	□ No		
If yes, do you authorize th your information on the Na		name, address and date of birth to ctors?	e Elections Canada □ Yes	a to update □ No		
Foreign Reporting						
Did you own or hold foreign property with a total cost of \$100,000 Canadian or more at any time during the year? If so, please provide details.						
Sale or Disposition of a Principal Residence or Other Real Property						
etc.)?	of any other real pro	dence this year? perty (cottage, vacation home, vauding postal code (attach addition	acant land, 🔲 Ƴ			
Year purchased:	Sold price:	Purchased Price:				

Foreign Pensions

Did you receive a pension from a country other than Canada? If yes, provide the following details for each pension received (attach additional pages, if required)

Country:	Amount:	Exempt portion:
Currency:	Start date:	Foreign taxes paid:

Tax on Split Income Requirement

Did you receive any of the following types of income from a private business, activity or profession where a related person who is resident in Canada has a significant interest or is actively involved:

1.	Dividends or shareholder benefits from a private corporation	🗋 Yes 🗋 No
2.	Partnership or Trust income from a related business	🗋 Yes 🗋 No
3.	Rental income (including through a trust or partnership) where a related person is involved	s 🗆 Yes 🗋 No
4.	Interest on loans to a private corporation, partnership or trust	🗆 Yes 🗆 No
5.	Income or gains from the disposition of private shares or other property	🗆 Yes 🗆 No

Income

T4 Slips – Employment income	🗆 Yes 🗆 No
T4A Slips – Commission, self-employment, pension and scholarships	🗆 Yes 🗆 No
T4AP Slips – Canada Pension Plan benefits	🗆 Yes 🗆 No
T4A(OAS) Slip – Old Age Security	🗆 Yes 🗆 No
T4E Slips – Employment insurance\ Repayment to CERB	🗆 Yes 🗆 No
T4PS Slips – Profit Sharing Plans	🗆 Yes 🗆 No
T4RSP Slips – RRSP income/withdrawals	🗆 Yes 🗆 No
T4RIF Slips – RRIF income/withdrawals	🗆 Yes 🗆 No
T5 Slips – Investment income	🗆 Yes 🗆 No
T3 Slips – Income from trust allocations	🗆 Yes 🗆 No
T5013 Slips – Partnership income	🗆 Yes 🗆 No
T5008 Slips – Income from security transactions	🗆 Yes 🗆 No
T5007 Slips – Social assistance and workers compensation	🗆 Yes 🗆 No
Details on the sale of unregistered stocks, bonds, mutual funds, etc	🗆 Yes 🗆 No
Foreign income	🗆 Yes 🗆 No
Details of rental income and expenses	🗆 Yes 🗆 No
Details of self-employed income and expenses	🗆 Yes 🗆 No
Details on spousal support income or expense	🗆 Yes 🗆 No
Any other income to report not reported on a slip	🗆 Yes 🗆 No
Deductions and Tax Credits	
RRSP contributions	🗆 Yes 🗆 No
Childcare expenses	🗆 Yes 🗆 No
Union, professional or association dues (for which not reimbursed)	🗆 Yes 🗆 No
Moving expenses	🗆 Yes 🗆 No
Carrying charges (interest and accounting fees)	🗆 Yes 🗆 No
Employment expenses (T2200 from employer required)	🗆 Yes 🗆 No
Did you contribute to a first home savings account	🗆 Yes 🗆 No
Northern resident deduction and travel expenses	🗆 Yes 🗆 No
Caregiver credit	🗆 Yes 🗆 No
Disability credit	🗆 Yes 🗆 No
Interest paid on student loans	🗆 Yes 🗆 No
T2202A Slips – Tuition paid	🗆 Yes 🗆 No

Medical expenses for (RX's please get statement from pharmacy)

Charitable donations

Political contributions

Provincial credits - property tax and/or rent

First time home buyers tax credit

Tax paid by installments

Did you include your property tax statement?

□ Yes
 □ Yes
 □ No
 □ Yes
 □ No

 \Box Yes \Box No

 \Box Yes \Box No

□ Yes □ No

□ Yes □ No