

PEVERILL & ASSOCIATES INCORPORATED

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PERSONAL INCOME TAX RETURN CHECKLIST 2023

IMPORTANT: Unless we have the information to complete your return by **April 15th**, we cannot guarantee that it will be completed before **April 30th**.

THE FOLLOWING SLIPS MUST BE FILED WITH CANADA REVENUE AGENCY:

- T4 slip from each employer during 2023
- T5 slip for all interest and dividends received in 2023
- Receipt for each charitable donation made in the year
- Old Age Security received
- Print-out for each medical expense paid in the year (you can get an annual summary from your pharmacist, dentist, etc.)
- T4A for any pension received in the year
- Receipt for all RRSP contributions made in year or by March 1, 2024
- T2202A form for tuition receipts
- T3 slips for any income from mutual fund investments
- **Medical and dental premiums paid in 2023 - make sure this number does not include life or disability insurance.**

RECEIPTS DO NOT HAVE TO BE SENT FOR THE FOLLOWING INFORMATION BUT SHOULD BE KEPT ON FILE:

- Childcare expenses, including Social insurance number and name of caregiver.
- Receipts for interest paid in the year on student loans.
- Details on the purchase price and proceeds on any investments sold in the year.
- If you sold a house in 2023, year of purchase and the proceeds received.

THE FOLLOWING INFORMATION IS REQUIRED IF YOU ARE CLAIMING EMPLOYMENT EXPENSES OTHER THAN THE STANDARD \$2 PER DAY:

- T2200 from your employer, including business mileage and personal mileage is claiming vehicle expenses
- Totals for each expense that you are claiming such as gas, travel, office, advertising, etc.
- Meals and entertainment amounts.

OFFICE HOURS:

- For the months of March and April: 8:30am – 5:30pm
- For the months of May and June: 8:30am – 4:30pm

PEVERILL PORTAL

We have a safe method for you to upload your documents rather than sending email. Check out www.peverill.ca/join-the-portal.html to sign up for this free service.