

<b>Personal Tax Checklist</b>	
Name as it appears on CRA documents:	SIN#
Birthdate:	
FULL Address:	
Phone Number:	
Email:	
Marital Status:	
Partners name as it appears on CRA documents:	Sin#
Spouse Birthday:	
Dependent Name:	SIN#
Dependents Birthday:	
Dependents:	SIN#
Dependents Birthday:	SIN#
<i>Details of any changes to family info, marital status, dependents, change of address, etc.</i>	
Prior year NOA (notice of assessment)	
Instalments made during tax year	
Tuition Transfer from spouse or dependent	
Caregiver Amount	
<b>T-Slips (most frequently used)</b>	
T4 Statement of Remuneration Paid (employment income)	
T4A Statement of Pension, Retirement, Annuity and other Income	
T4A (OAS) Statement of Old Age Security	
T4A(P) Statement of Canada Pension Plan Benefits	
T4E Statement of Employment Insurance & Other Benefits	
T4RIF Statement of Income from A Registered Retirement Income Fund	
T4RSP Statement of RRSP Income	
T5 Statement of Investment Income	
T5008 Statement of Securities Transactions	
T2200 Declaration of Conditions of Employment (needs to be signed by employer)	
T2202 Tuition Paid	
<b>Other Income:</b>	
Tips & Gratuities not already on T4 or T4A	
Rental Income T776 Statement of Rental Estate Rentals	
Expenses part of Rental income	
T2125 Self-employment - Statement of Business or Professional Activities	
RRSP redeemed	
Home Buyers Plan	
Lifelong Learning Plan	
<b>Other Considerations: where applicable I can send fillable forms</b>	
Adoption Expenses	
Alimony or maintenance received or paid	
Annual dues for membership in a trade union or public service	
Annual dues for membership in professional organization	
BC Renter's Tax Credit (new in 2023) see BC Renters Tax Credit worksheet	
<b>Charitable donations, see charitable donation worksheet to complete</b>	
Childcare Expenses (can include camps where childcare included)	
<b>Fees for investment advice (these can be claimed on S4) for non-registered investments check your investment statements for charges</b>	
Home accessibility Expenses	
Interest expenses (amount paid and details of loans for business or investment purposes)	
<b>Medical Expenses, including premiums paid for private health insurance see medical worksheet to complete</b>	
Moving Expenses	
Personal Attendant/Faculty Care Expenses	
RRSP contribution receipts	
Student Loan Interest Amounts	
TFSA Tax Free Savings Account	
Union Dues if not included on your T4 slip	





### British Columbia renter's tax credit

**Note:** If you had a spouse or common-law partner on December 31, 2023, only one of you can claim this credit for both of you.

#### Declaration for the renter's tax credit

By signing my return, I declare the following information about my rental in British Columbia during 2023:

Column A Rental address	Column B Rent paid at address <sup>(1)</sup>	Column C Number of months of tenancy at this address	Column D Name of landlord or company to whom the payment was made

(1) Do not include any amounts paid to a non-arm's length party

Number of months rent was paid for all rental units  
(total of column C from the table above)

**60575** 0 34

If you qualify, and your adjusted family net income, on line 6 of page 1, is **less than \$60,000**, enter \$400 on line 60576. If the adjusted family net income is **between \$60,000 and \$80,000**, complete lines 35 to 40 below and enter the result on line 41. If your adjusted family net income is **more than \$80,000**, you cannot claim this credit. Enter "0" on line 41.

Renter's tax credit maximum amount  
Enter your adjusted family net income

400|00 35

Column A Rental Address	Column B Rent paid at address	Column C # of months	Column D Name of whom was paid

## Optimizations Worksheet

### ^ TaxCycle optimization :

Maximize refund

Maximize carryforward

#### Reduce tax payable to zero

Reduce federal **AND** provincial tax payable to zero

Reduce federal **OR** provincial income tax payable to zero, whichever comes first.

Reduce Federal income tax payable to zero

Reduce Provincial income tax payable to zero

No optimizations

Note: Optimization calculations are run sequentially based on credit ordering provision defined in the Income Tax Act: 118.92. Applicable unused amounts that are not utilized after optimizations are calculated will carry forward to the next tax year.