

Providing the following documents will assist us in completing your
2022 Personal Income Tax Return

Any Reassessment Notices received in the last year

Income

- First year for CPP, OAS?
- T4 for employment income
- T4E for employment insurance benefits
- T4RSP for RRSP withdrawals
- T5007 for government benefits
- T5013 for partnership income
- Rental property revenue and expenses (including short term rental such as AirBnB)
- Business income and expenses
- Self-employed income and expenses (including Instacart, Uber, Doordash, Lyft, Rover, etc.)
- Details of foreign income or other pensions received
- Online revenue (including Google Ads, Instagram, Amazon sales, YouTube, Etsy, etc.)
- Details of the purchase/sale of crypto currencies
- T3 for trust income
- T4A for other income
- T4P for pension income
- T5 for investment income
- T5008 for sale of securities
- Spousal and/or child support received

Receipts/Expenses

- RRSP contributions
- Charitable donations
- Long-term care (detailed receipt from facility)
- Child care
- T2202 tuition fees
- T2200 employment expenses
- T2200S Work-from-Home employment expenses
- TL2 Claim for Meals and Lodging Expenses (for transport employees including truck drivers)
- Medical expenses, including extended health and/or travel medical insurance plan premiums
- Union or professional dues
- Political contributions
- Digital News Media subscriptions
- Student loan interest
- Moving expenses
- Spousal and/or child support paid
- Investment expenses (interest, management fees)

Please let us know if you want to consider applying for the Disability Tax Credit (DTC).

The DTC is a non-refundable tax credit that helps persons with disabilities or their supporting persons reduce the amount of income tax they may have to pay. The purpose of the DTC is to provide for greater tax equity by allowing some relief for disability costs, since these are unavoidable additional expenses that other taxpayers don't have to face. Eligibility is determined based upon a form completed by your medical practitioner and reviewed by Canada Revenue Agency. To qualify, a person must have an impairment in their health that is prolonged (minimum of 12 months in duration) and be present at least 90% of the time.

ALL information gathered will be maintained in accordance with our privacy policy. This checklist is meant to act as a reminder of the information to be included in preparing a 2022 Canadian personal income tax return.

If you wish to submit copies of these document electronically, please email us for a private link to a secure online portal.

Due to timing restrictions, our firm cannot guarantee the completion of your taxes by the May 1st deadline if all information has not been received in our office by April 20th.

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