

**Providing the following documents will assist us in completing your
2023 Personal Income Tax Return**

Any Revenue Canada Notices of Reassessment received in 2022

Income

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

Receipts/Expenses

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

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

The DTC is a non-refundable tax credit intended to provide persons with disabilities greater tax equity by allowing some relief for unavoidable additional expenses that other taxpayers do not incur. 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 present at least 90% of the time.

Please let us know if you may require a Underused Housing Tax (UHT) Return to be filed

If you owned residential property in 2023 other than your principal residence - including a cottage or cabin - you may need to file an additional tax return, even if you are exempt from paying the UHT on that property. This applies even if you owned the property jointly with other individuals, as a trustee through a trust, or as a partner in a partnership.

- 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 2023 Canadian personal income tax return.
- If you wish to submit copies of these documents 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 April 30th deadline if all information has not been received in our office by April 20th.

Baumgartner & Company Chartered Professional Accountants

12816 St. Albert Trail NW, Edmonton, AB T5L 4H6
t: 780.484.1133 e: Info@BandCompany.ca www.BandCompany.ca