

PERSONAL INCOME TAX CHECKLIST - 2023 (one per person/SIN number)

****YOU **MUST** ANSWER Ques 7-14 & SIGN PAGE 2 BEFORE I CAN DO YOUR TAX RETURN****

NAME: _____

BIRTHDATE (Y/M/D): _____ S.I.N: _____

HOME PHONE: _____ CELL: _____ EMAIL: _____

ADDRESS (as of Dec 31): _____ PC: _____

Did you move >40 km during the year? circle: Yes No

Old Address: _____ Date of move: _____

Do you want to give CRA your email to receive your NOA and correspondence through CRAs my account? You will no longer receive paper mail from CRA done previously Yes No

Marital Status (circle): Single Married Common-Law Divorced Separated Widowed

Did your marital status change during the year? Circle: Yes or No If so When?: _____

SPOUSE NAME: _____ THEIR NET INCOME (if I am not preparing their return): _____

SPOUSE SIN: _____ SPOUSE BIRTHDATE (Y/M/D): _____

FILL OUT FOR ALL CHILDREN - **TAX CREDIT FOR CHILDREN <18list kids under 18****

Child #1: _____ DOB(Y/M/D): _____ SIN: _____ Mor F? Living @home: Yes/No

Child #2: _____ DOB(Y/M/D): _____ SIN: _____ Mor F? Living @home: Yes/No

Child #3: _____ DOB(Y/M/D): _____ SIN: _____ Mor F? Living @home: Yes/No

PERSONAL EXEMPTIONS, DEPENDANTS AND OTHER INFORMATION

1. Did any of your dependants earn income this year? (Ignore if we are preparing a return for those dependants) Yes No

2. Did you support any other dependants during the year? Yes No

3. Were you or a dependant disabled during the year? (Impairment must have lasted or be expected to last for more than 1 year) Complete Form 2201 and provide caregiver receipts. Yes No

4. If you started, changed or finished paying child support or alimony, please provide the agreement. Yes No

5. Did you or your child begin College/University? Yes No Did they live in residence? Yes No

THE FOLLOWING INFORMATION MUST BE PROVIDED ALONG WITH RECEIPTS:

Please check the appropriate boxes, attach required documents/receipts and return to Julie's Office.

INCOME	DOCUMENTATION REQUIRED	# OF	
		ITEMS	N/A
Salaries, wages, commissions, fees, allowances, CERB, CRSB, CRB	T4, T4A		
Pensions, Disability certificate, EI Benefits	T4A, T4AP, T4A(OAS), T4(RIF), T2201, T4E		
Investments: Interest, Dividend, RRSP or Foreign Income	T5, T4PS, T600, T3, T5008, T5013, T4RSP		
Capital Gains & Losses, Trust or Estate Income	Buy-Sell slips, T3, T4PS, T5, Info		
Sale of residence? Was more than 1.24 acres sold?	Answer yes or no:		
Rental Income - Canadian or Foreign	T776, T5013 or Income & Expenses List		
Alimony, child support or separation allowances, amount paid and agreement needed if new client			
WCB, social assistance, directors fees	T5007, Receipt, Listing of income		
Other: retiring allowances, scholarships, bursaries, grants	T4A, Listing of Income		
Income & Expenses of Self Employment/Sole Proprietor/Farm	Listing or Financial Statements		

Website address(es) that you earn income from & % of income from that site: _____

DEDUCTIONS & CREDITS	DOCUMENTATION REQUIRED	# OF	
		ITEMS	N/A
Allowable employment expenses (auto, travel etc.)	T2200, Receipts		
RRSP contributions up to FEB 29, 2024** YOU MUST SUBMIT*** these with your 2023 year or when we do 2024 taxes we will have to amend your 2023 return****	March 1- Dec 31 2023 RRSP Slips MUST submit any January - Feb 2024 RRSPs with this checklist		
Did you purchase a home using RRSP funds? Home buyers Plan - Did you repay?			

DEDUCTIONS & CREDITS Continued...	DOCUMENTATION REQUIRED	# OF	
		ITEMS	N/A
Multigenerational home reno credit to create secondary suite/lodging, receipts up to \$50,000, details on who its for			
Home Office - need T2200 filled by employer, and a T777 filled out by you			
Union, professional dues	Official Receipts		
Tuition fees to be deducted by Student or parent	T2202, signed by student to parent?		
Child Care expenses-name, address, SIN of caregiver	Receipts		
Investment carrying charges, Loan interest for investments	Receipts		
Accounting fee receipt for prior year tax return if <u>NOT prepared by me</u> to offset investment income			
Moving Expenses(>40km) -incl. 15 day temp lodging	T1M/Receipts		
Alimony, child support paid	Amount		
Medical Expenses - for any 12 month period	Receipts totaled by person by treatment		
Ontario Property Tax Credit (provide Rent or Taxes Paid)	Name of landlord / Municipality/Amt		
Student Loan Interest	Loan statement		
Are you a volunteer firefighter OR Search and Rescue?	Info re the required 200 hours		
Income Taxes paid in Installments	Receipts		
Family Caregiver Amount	Impairment Statement from Doctor		
Charitable Donations	Official Receipts		
Home Accessibility Tax Credit (HATC) on Reno's - Seniors&Disabled	Receipts up to \$20,000 **		
Educator School Supply Tax Cr -Submit receipts <= \$1000, Letter from employer attesting to eligible supplies			
Canada Training Credit- 25yrs +, based on \$500 eligible tuition/fees for work-related training			
Safety Deposit boxes, childrens arts & fintess, and staycation NO LONGER deductible			
HST, Climate action, TFSA - Tax free savings account, I do NOT need any of this paperwork			

In this checklist, I am requesting only those receipts, forms and statements that are required to be filed with the tax return.

However, Canada Revenue Agency expects documentary support for all deductions taken and may audit all or some of those other receipts or documents after the return has been filed at an additional cost - *Julie*

YOU MUST ANSWER THE FOLLOWING & SIGN BELOW OR I CAN'T DO YOUR RETURN

Circle

6.NEW CLIENTS ONLY** please submit to me your 202 or last filed Income Tax Return.	Yes	No
7. Please submit to me last years Notice of (re)assessment if you have it.	Yes	No
8. Are you a Canadian Citizen?	Yes	No
9. Do you authorize Canada Revenue Agency to provide Elections Canada with your name, address and birth date so they can update the National Register of Elections.	Yes	No
10. Disposition of Principal Residence - If you sold your home or other real property in 2023 or changed it from residence to rental you MUST TELL ME to ensure tax exemption, provide: proceeds, address, year acquired and number of months as Principal residence. Not reporting = max PENALTY of \$8000 with interest - this is NOT statute barred and can go back indefinitely - DID YOU SELL YOUR RESIDENCE THIS TAX YEAR?	Yes	No
11. Did you dispose of a housing unit, rental rental property or rights to purchase a property in 2023?	Yes	No
12. Did you Hold Foreign investments OR PROPERTY in tax year with total COST >\$100,000CAD? Details please	Yes	No
13. Did you own an interest in a foreign affiliate (non-resident corp/shares) at any time in 2023?	Yes	No

***It is understood that I have provided Julie with all required, accurate & complete information to compile the tax return so she can prepare it. I agree that I have all receipts that support the information given to Julie and I can provide them to CRA should they request them. Julie will not audit, review or otherwise attempt to verify the accuracy or completeness of any information provided as the responsibility remains with me, the taxpayer. Julie has emphasized that this engagement cannot be relied on to prevent or detect errors or other irregularities in the information provided to her. I am aware CRA can charge me a 20% penalty on unreported income from slips I may be missing if I file without them. I recognize that Julies fees are due at signoff of the tax return. I understand that my tax return will be stamped with the following: **Prepared without audit from information supplied by myself.**

I agree with your understanding of the terms of your engagement as preparer of my personal tax return as set out above.

Signature:

Date:

Please return this completed and **SIGNED** checklist and submit all required information and slips to:

JULIE PHILLIPS CPA, 171 WATER STREET, ST. JACOBS, ON N0B 2N0

mrsjuliephillips@gmail.com or visit www.juliephillips.ca