

DATE RECEIVED \_\_\_\_\_

PICK UP DATE \_\_\_\_\_

# T1 Personal Tax Return Year



Please complete this checklist and return it to us together with your financial information

Number of tax returns to be prepared: \_\_\_\_\_

Personal Information	Spouse Information (If Applicable)
Name:	Name:
SIN Number:	SIN Number:
Date of Birth: (MM/DD/YY)	Date of Birth: (MM/DD/YY)
Phone #:	Phone #:
E-mail:	E-mail:
Address:	Address:
City	City
Province/State: Postal Code:	Province/State: Postal Code:
<b>Did you during the year:</b> Emigrate from Canada?      Immigrate to Canada? <i>Emigration date:</i> <i>Immigration date:</i>	Emigrate from Canada?      Immigrate to Canada? <i>Emigration date:</i> <i>Immigration date:</i>

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

Did your marital status change from last year's tax return?     Yes/No      *Date status changed:*

Are we preparing a tax return for your spouse?     Yes       No       N/A

If we are **NOT** preparing a tax return for your spouse, please provide: *Income figure from Line 23600 on page 4* \$ \_\_\_\_\_

**Please list all dependants below:**

Name	Relationship	Birthday (MM/DD/YY)	SIN#	Net Income During Year
1 _____				
2 _____				
3 _____				
4 _____				

**Other Matters**

- |  |     |    |
|--|-----|----|
| 1 Do you, your spouse or any of your dependants qualify for the Disability Tax Credit?<br><i>If yes, please indicate whom:</i> _____             | Yes | No |
| 2 Are you a Canadian citizen?  | Yes | No |
| 3 Do you authorize the CRA to provide information about you to Elections Canada?   | Yes | No |
| 4 Do you own/hold foreign property (including shares) with a total cost of more than \$100,000 (CAD)?  | Yes | No |
| 5 Have you made installment payments for the tax year? <i>If yes, how much</i> \$ _____  | Yes | No |
| 6 Did you sell your principal residence? <i>If yes, what year?</i> _____   | Yes | No |
| 7 Are we preparing a tax return for a deceased person?<br><i>If yes, date of death</i> _____; <b>Copy of death certificate and will required</b> | Yes | No |
| 8 Are you claiming work from home expenses? Signed T2200 req'd   | Yes | No |
| 9 Did you pay property tax? Property tax paid \$ _____   | Yes | No |
| 10 Did you rent? Rent pd:\$ _____ Name of landlord: _____  | Yes | No |
| 11 Do you have a rental property, sold your 2nd property or have self employed income? Details req'd   | Yes | No |
| 12 Are you a first-time home buyer?<br><i>If yes, need address of property and acquisition date. Max \$10,000 x 15% - \$1,500</i>                | Yes | No |
| 13 Are you a trustee, settlor or beneficiary of a trust? (New Trust reporting requirement for 2023)  | Yes | No |

Please bring your 2022 Notice of assessment if you have it

Please complete at back any additional notes or information that are relevant to completing your tax return