

Personal Tax Checklist- 2023

1. Personal Information

- Full name
- Address/phone number
- E-Mail
- Social Insurance Number
- Date of birth
- Marital status as of December 31, 2023
- Dependents/Spouse(name, SIN and date of birth)

2. Income and Expense Information

- Employment income (T4)
- Employment insurance and other benefits (T4E)
- Pension, retirement, annuity, and other income (T4A)
- Old Age Security and Canada Pension Plan slips: T4 and T4A(OAS)
- Investment income (T3, T5, and T5008)
- Social assistance and worker's comp (T5007)
- RRSP and RIF income (T4RSP, T4RIF)
- Summary of rental income and expenses per property
- Summary of business income and expenses
- Employment expenses (T2200 is required)

3. Deductions and Credits

- RRSP contribution slips
- Charitable donation receipts
- Political donation receipts
- Medical expense summary
- Medical premiums paid to for health insurance plans
- Tuition and education expenses (T2202A or TL11 is required)
- Student loan interest
- Childcare expenses
- Children's fitness and art expenses (MB)
- Adoption expenses
- Professional or union dues (If not included on your T4)
- School supply expenses (teachers)
- Tool expenses (trade)
- Rent
- Property tax receipt
- Receipt for electronic subscription to Canadian newspapers
- Legal expenses to collect spousal support, pension or retiring allowance
- Home renovation/accessibility expense
- Investment advisor fees and interest expenses on **non-registered investments**



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4. Tax Documents

- Notice of Assessment from the previous year
- Correspondence from CRA
- Summary of instalment payments made for the tax year
- Copy of last year's tax return- NEW CLIENTS ONLY

5. Other Information

- Declare foreign property over \$100,000 including investments in foreign shares (excludes personal use properties)
- Sale of capital property- sale agreement and cost information including selling costs
- Did you sell your home/cottage?- Principal Residence Election (sale price, address, and year originally acquired)



The above list is not all inclusive. Your accountant may require additional information depending on your situation. The above check list is only a general guideline to prepare your tax package for drop off.