



Personal Income Tax Checklist

Instructions: Please complete this checklist and return to H&A with your 2021 personal income tax information (slips and receipts, etc.)

Name (First, Last): _____

Address: Street _____

City, Province _____

Postal Code _____

Telephone _____

(indicate if home, cell or office #):

*** Please indicate preferred method to receive T183 and TP-1000.TE-V: *Consent to E-File* for signing:

Email: _____

Fax: _____

Birth date (dd/mm/yyyy): _____

Province of Residence _____

on December 31, 2022: _____

Are you a Canadian Citizen? Yes No

Canadian citizens only:

“Do you authorize the Canada Revenue Agency to provide your name, address, and date of birth to Elections Canada for the National Register of Electors?” Yes No

Did you become a Canadian resident during the year? Yes No

Date of arrival (dd/mm/yyyy) _____

Your revenue prior to your arrive \$CAD _____

Your spouse’s revenue prior to arrival date \$CAD _____

Marital Status: Single Married Separated Divorced Widowed Common-Law

Marital status change? Yes No

Date of change: _____

Information about spouse or common-law partner (if H&A is not preparing return of spouse of common-law partner):

Name (First, Last): _____

Date of birth (dd/mm/yyyy)

Social Insurance Number: _____

Net Income (if H&A is not preparing return) Fed (Line 236)\$ _____ Quebec (Line 275)\$ _____



Amount of Universal Child Care Benefit included in spouse net income for 2016 and prior years? \$ _____

Amount of Universal Child Care Benefit repayment included on spouse's 2021 tax return \$ _____

Is your spouse self-employed? Yes No

If eligible, do you wish to split pension income with your spouse? Yes No

Dependents:

Name	Birth Date	Net Income (if any)	S.I.N.
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Please ensure the following information is forwarded as soon as available: Check if Information Attached

1. All information slips (federal & provincial equivalent):

Employment	T4, T4A	<input type="checkbox"/>
Partnership income	T5013	<input type="checkbox"/>
Pension or Disability Payments	T4A	<input type="checkbox"/>
Interest, Dividends	T5	<input type="checkbox"/>
Mutual Funds and Other Trusts	T3	<input type="checkbox"/>
Old Age Security	T4A (OAS)	<input type="checkbox"/>
Canada Pension	T4A (P)	<input type="checkbox"/>
Employment Insurance	T4E	<input type="checkbox"/>
Income from RRSP or RRIF	T4RSP; T4RIF	<input type="checkbox"/>
Canadian Exploration/ Development Expenditures	T101	<input type="checkbox"/>
Purchase and Sale of Securities	T5008	<input type="checkbox"/>
Social Assistance, Workers Compensation	T5007	<input type="checkbox"/>
Universal Child Care Benefit	RC62	<input type="checkbox"/>
Other, including Foreign Slips		<input type="checkbox"/>

2. All official receipts (federal and provincial equivalent):

Check if Information Attached

Registered Retirement Savings Plan Contributions		<input type="checkbox"/>
Charitable Donations		<input type="checkbox"/>
Political Donations		<input type="checkbox"/>
Professional or Union Dues		<input type="checkbox"/>
Tuition Fees	T2202/2202A/TL 11A*	<input type="checkbox"/>
*If receipt is for a dependent, please have dependent sign in appropriate place on the form.		
Education Deduction		<input type="checkbox"/>
Registered Education Savings Plan		<input type="checkbox"/>
Childcare expenses (summer camps, fitness, arts)		<input type="checkbox"/>
Interest paid on student loans		<input type="checkbox"/>
Medical Insurance Premiums		<input type="checkbox"/>
Medical, Dental and/or Pharmacy Expenses		<input type="checkbox"/>

3. Listing of self-employment income and expenses:

Province of self-employment _____

Include GST information, if applicable.

Please indicate if you employ an apprentice in this business Yes No

Is this business that of a long-haul truck driver? Yes No



4. Listing of income and expenses for rental property.

Include GST information, if applicable

5. Details of employment expenses:

Employees must attach Form T2200 signed by their employer.

Automobile Expenses

Note: If more than one vehicle is used for business purposes, provide a separate listing of expenses.

Cost of vehicle, if purchased in the year (attach invoice)	\$ _____
Proceeds received on disposal of old vehicle, if applicable	\$ _____
Gas and oil	\$ _____
Repairs and maintenance	\$ _____
Insurance	\$ _____
License	\$ _____
Total kilometers driven for the year	_____
Business kilometers driven for the year	_____

Office-in-the-home-expenses (Specify)

Utilities (heat, water, electricity)	\$ _____
Insurance	\$ _____
Maintenance	\$ _____
Property	\$ _____
Other (Specify) _____	\$ _____

6. Family Expenses:

Amount of support payments or alimony payments paid or received and name and address of payor/recipient _____

}	spousal	\$ _____
	child	\$ _____

- Details regarding child care expenses _____ \$ _____

- Adoption Expenses \$ _____

7. Investments

- Particulars relating to tax shelters and the required forms (including limited partnership investments) \$ _____

- Listing of investments on which accrued interest is required to be reported and for which a tax reporting form has not been received \$ _____

- Carrying charges and interest paid to earn income from investments (also include investment counsel fees and safety deposit box fees) \$ _____

- Details on disposition of capital property (stocks, mutual funds, real estate)
Provide original cost, proceeds and expenses on disposition \$ _____

- Disposition of real property (vendor statement, original cost, proceeds on sale, purchase date, legal costs and commission) \$ _____

8. Other items:

- Please provide a copy of your prior year Notice of Assessment from CRA

- Please provide a copy of your prior year tax return filed with CRA and Revenue Quebec (if applicable)

- Amount of instalment payments made during the year (attach CRA statement) \$ _____

- Any other income from other sources received during the year
Please provide amounts and description _____ \$ _____

- Professional Dues or Membership fees \$ _____

- Form T1212 – Statement of Deferred Stock Options Benefits \$ _____

- Amount of Lifelong Learning Plan withdrawal or Home Buyer's Plan withdrawal from your RRSP received in the year \$ _____

- Amount of RRSP contribution designated as loan repayment for a prior year loan \$ _____



- Amount of interest paid on student loans \$ _____
- Amount of medical expenses paid personally (for self or dependent and include a detailed list) \$ _____
- Details regarding eligible moving expenses _____ \$ _____
- Did you acquire a qualifying home that you intend to occupy as a principal residence within a year of purchase? Yes No
- Did you sell your principal residence in 2021? Yes No
- Are you entitled to a disability amount for yourself or a dependent? Yes No
- Are you entitled to a disability supports deduction amount for yourself or a dependent? Yes No
- Amount of property taxes or rent paid in the year (Ontario residents only) \$ _____

9. Are you a U.S. citizen or do you hold a valid U.S. green card? * Yes No

*If you are a U.S. citizen or hold a valid U.S. green card you are required to file a U.S. income tax return and may be required to file certain U.S. information returns. If you have not been filing any U.S. returns, please contact us immediately

10. Prescription Drug Insurance

Governmental Insurance: From _____ To _____

Group Plan: From _____ To _____

Spousal's Group Plan: From _____ To _____

11. Have you applied for any of the following benefits in 2021? Yes No

- CERB:** Canada Emergency Response Benefits
- CRB:** Canada Recovery Benefits
- CRCB:** Canada Recovery Caregiving Benefits
- EI:** Employment Insurance Benefits
- CESB:** Canada Emergency Student Benefits
- CRSB:** Canada Recovery Sickness

12. Were you required by your employer to work from home due to COVID-19 pandemic (or were you given a choice to work from home)? Yes No . If yes, have you received a completed signed copy of Form 2200/2200S/TP-64.3 (QC) from your employer (detailed method)? Yes No . If No, how many days have you worked from home during 2021 (flat rate method)? _____.

FOREIGN PROPERTY REPORTING

- A) Did you earn any income or realize any gains from foreign property in 2022? ^(Note 1) Yes No
- B) Did you own foreign property at any time during the year (2022), the aggregate cost of which exceeded \$100,000? ^(Note 2) Yes No
- C) Did you loan or transfer funds or property to a non-resident trust in 2022, or any previous years? ^(Note 3) Yes No
- D) Did you receive funds or property from, or were you indebted to, a non-resident trust in 2022 or prior years in which you were beneficially interested? ^(Note 4) Yes No
- E) Did you have an interest in a foreign corporation in 2022 where the equity percentage held by you together with related persons was equal to or greater than 10%? ^(Note 5) Yes No
- F) Are you the beneficiary of a foreign trust? Yes No



G) Do you own shares, trust or partnership units in a foreign entity that is not publicly traded on a Canadian or a foreign exchange? Yes No

NOTES:

- (1) Canadian residents are required to report income from all sources, both inside and outside Canada. Ensure that the details relating to foreign source income have been provided to us.
- (2) Foreign property includes:
 - funds held outside Canada (including foreign bank accounts),
 - tangible property located outside Canada (including real estate but excluding personal use property and property used in the course of carrying on an active business),
 - an interest in a non-resident trust including a foreign mutual fund trust,
 - intangible property located outside Canada including rights to royalties and shares of Canadian corporation deposited with a foreign broker,
 - debt, such as, a note, bond or debenture owed or issued by a non-resident, and
 - shares in non-resident corporations

But does not include

 - foreign property held in a registered plan such an RRSP or an RPP and
 - Canadian mutual funds that contain foreign investments.

If the aggregate cost of foreign property at any time in 2022 exceeded \$100,000 (Cdn.), form T1135, **Foreign Income Verification Statement**, must be completed and filed with your 2022 return. If you meet the reporting criteria, please provide details about your foreign properties, including: a description, cost amount, location and related income
- (3) ~~generates (if only)~~ If you answered “yes” to this question, you are required to file form T1141, **Information Return in Respect of Transfers or Loans to a Non-resident Trust**, no later than April 30, 2022. A separate form is required for each non-resident trust. This information return is filed separately from your income tax return. This return is not required in the year that an individual immigrates to Canada.
- (4) If you answered “yes” to this question, you are required to file form T1142, **Information Return in Respect of Distributions From and Indebtedness Owed to a Non-resident Trust**, no later than April 30, 2022. A separate form is required for each non-resident trust. This information return is filed separately from your income tax return. This return is not required in the year that an individual immigrates to Canada.
- (5) If you answered “yes” to this question, you may be required to file form T1134-A or B **Information Return Relating to Foreign Affiliates that are not Controlled Foreign Affiliates/ Information Return Relating to Controlled Foreign Affiliates** no later than March 31, 2022. A separate form is required for each non-resident corporation. This information return is filed separately from your income tax return. This return is not required in the year that an individual immigrates to Canada.

Direct Deposit (for 1st time registrant or to change banking information with CRA and QRA)

CRA is phasing out providing refunds by cheque. If you are not set up for direct deposit with CRA and Quebec Revenue, please complete either with a “Void” check or provide us with the following information:

Name of Bank Institution: _____

Branch # (5 digits): _____

Institution # (3 digits): _____

Account # (9-12 digits): _____

Name on Account: _____

To the best of my knowledge, the above information is accurate and complete

Signature: _____

Date: _____