**GENERAL INFORMATION**

□ New address information

□ Change to marital status

□ Changes to any dependent information in your

family (e.g. new children)

□ Rent and/or property tax paid

□ Details on sale of principal residence and/or

rental property during the year (address, year of

acquisition, proceeds of sale, etc.

□ Details of foreign property/investments owned

with a total cost of more than CAD $100,000?

**INCOME DETAILS and INFORMATION SLIPS**

□ Information slips (T3, T4, T4A, T5, T4RSP, T4E,

T4AP, T4A(OAS), T4PS, T4RIF, T5013, T5007, T5008

etc.)

□ Other pensions (including foreign pension) not

included in information slips

□ Amount of spousal support (not child support)

paid or received

□ Self employment income and expenses for sole

proprietorship businesses (e.g., real estate

agents, mortgage brokers, trades, taxi and uber

drivers, and other businesses. (*ask us for a*

*detailed checklist*)

□ Rental income and expenses.

(*ask us for a detailed checklist*)

□ Capital gains (sale of stocks, sale of rental

investment properties)

□ Income from foreign assets / sources

**DEDUCTIONS**

□ RRSP contribution slips (period: March to Dec 2022

and Jan 1 – Mar 1, 2023)

□ Child care expense receipts ($8,000 for kids

under 7 and $5,000 for kids age 7 through 16,

and $11,000 for kids with disability)

□ Statement of interest paid for business or

investment loans

□ Moving expenses (non-reimbursed moving

expenses if you moved 40 km closer to a new

work/educational location)

□ Employment expenses (where employer has

provided a T2200 form. (*ask us for a detailed*

*checklist*)

□ Home Office Expenses *(due to COVID-19 - continued****)***

□ TL2 meals & lodging for transportation

employees

□ Professional consultant fees

□ Legal fees paid to establish spousal

support or to enforce a pre-existing agreement

□ Legal fees paid to recover wages from your

employer

**COMMON CREDITS**

□ First time home buyer – 10k (2021 - 5k)

□ Tuition fee slips (T2202A / TL11) - taxpayer and

dependents

□ Medical expense receipts for yourself and your

dependents

□ Official charitable/political donation receipts

□ Student loan interest receipts

□ Disability tax credit (approved T2201 required)

□ Adoption expense credit

□ Home Accessibility Credit – 20k (2021 - 10k)

**2022 MARGINAL PERSONAL TAX RATES (Ontario)\***

Basic personal exemption limit (Fed. $14,398, ON - $11,141)

Table

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