

Personal Tax Return Checklist

If there have been changes we need to be aware of, please complete and return this form with your complete tax package no later than April 15th

Our default is to publish your tax return to our secure portal.

If you do not use our portal and require a paper copy, please indicate your preferred delivery method. ☐ Mail ☐ Pick-up

If this is the first year we are preparing your tax return, please provide a copy of your prior-year return.

Full Name	Birthdate	SIN	Primary contact #	Email address	Marital status	Citizenship (all)	Relation to you

Marital Status – if your status changed during the year, please indicate the date it changed: _____

Family Address: _____

Dependent's address (if different): _____

Do you want your tax refund deposited directly to your bank account? ☐ No ☐ YES (attach void cheque)

Do you want information from Ontario Health about organ and tissue donation? ☐ No ☐ YES

Do you want to receive e-mail notifications from CRA through your My Account? ☐ No ☐ YES (indicate your email)

Did you work from home? ☐ No ☐ YES

If yes, provide the detailed home office claim. Please obtain a T2200 from your employer.

Did you repay any COVID-19 relief? (including assistance for your self-employed business) ☐ No ☐ YES (attach details)

Do you, together with related persons (individuals/partnerships/trusts), own 10% or more of the shares of a company that is NOT resident in Canada (foreign affiliate)? ☐ No ☐ YES (attach details)

Did you own foreign property with a cost over CDN \$100,000 at any time during the year?

☐ No ☐ YES (attach details)

Did you buy your first home this year?

☐ No ☐ YES (attach details)

Did you sell your home?

☐ No ☐ YES (attach details)

If yes, provide; Proceeds: _____ Cost: _____ Year Bought: _____

If yes, did you own more than one personal use property during the same period?

☐ No ☐ YES

Do you (or a family member) have a mental or physical impairment or disability?

☐ No ☐ YES

If yes, have you applied for the disability tax credit?

☐ No ☐ YES

Have you or your spouse spent more than 120 days in the US in 2023, 2022, and/or 2021?

☐ No ☐ YES

(Time spent includes business or pleasure. Count partial days as one full day)

Do you have a spouse or dependent(s) for whom we do not prepare their tax returns?

☐ No ☐ YES

If yes, please provide their personal details, their net income for the year, and their tuition details (if any). (A copy of their tax return is recommended)

Did you take any courses eligible for the Canada training credit?

☐ No ☐ YES (attach details)

Are you a tradesperson who temporarily relocated for work in the construction industry?

☐ No ☐ YES (attach details)

Are you a tradesperson who purchased tools?

☐ No ☐ YES (attach details)

Did you subscribe to a qualified Canadian journalism organization eligible for the digital news subscription expense tax credit during the year?

☐ No ☐ YES (attach details)

(Seniors) Did you make improvements to your residence to facilitate safety and accessibility?

☐ No ☐ YES (attach details)

Are you a volunteer firefighter or a search and rescue volunteer?

☐ No ☐ YES

Did you make any money from the platform economy (internet or apps)?

☐ No ☐ YES (attach details)

The platform economy includes Airbnb, Uber, gigs, Etsy, Amazon, social media, etc..

Contact our office at 905-766-9584 or visit our website at www.busscpa.ca/resources to obtain a detailed worksheet for business or rental statements or employment expenses (working from home).