

T1 INFORMATION CHECKLIST 2022

NAME _____
 SPOUSE _____
 TELEPHONE _____

SIN _____
 SPOUSE SIN _____
 EMAIL _____

GENERAL

- Please provide entry or departure dates if you did not reside in Canada throughout 2022
- Did you move during 2022
- 2022 tax instalments paid (T7D)
- 2021 Notice of Assessment unless retained by our office
- Please provide details of change of marital status in 2022. Married? Divorced? Separated? (Y/N)
- Your 2021 personal tax return if we did not prepare it
- Your 1994 personal tax return if you made the capital gains election
- Did you purchase a qualifying home in 2022?
- Did you sell real estate in 2022?
- In 2022, were there any children born or adopted in your family?

DID YOU RECEIVE ANY OF THE FOLLOWING INCOME?

- Salary, wage or commissions (T4)
- Old Age security (T4A OAS)
- Foreign Income including Pensions
- Canada Pension (T4A P)
- EI Benefits (T4E)
- Other Pensions (T4A)
- Dividends (T5)
- Interest (T5/T600)
- Other investment income
- Estate or trust income (T3)
- RRSP income (T4RSP)
- RRIF income (T4RIF)
- Rental income, revenues and expenses, additions & disposals
- Partnership / tax shelter income (T5013/T101)
- Receipt of alimony/separation payments
- Apprenticeship completion grant
- Other income
- Covid Benefits (T4A or T4E) - confirm accuracy**

WERE YOU SELF EMPLOYED?

- Attach financial statements if not prepared by us
- Do you have a Business Number?
- Are you a GST registrant?

ALLOWABLE DEDUCTIONS/CREDITS (if applicable)

- Commission/employment expenses (must have signed T2200 by employer)
- Political donation receipts (BC and Federal)
- RRSP contribution receipts - March-Dec 2022 plus first 60 days of 2023
- Charitable donation receipts
- Donations of publicly listed shares or investment products
- Medical Receipts - Please request detailed print out from Pharmacy
- Tuition receipts (T2202/T2202A) - for yourself or dependants
- Attendant care expenses
- Child care expenses (include name, SIN and address of person receiving income, or Daycare license number)
- Payment of alimony / separation allowance
- Moving expenses
- Accounting and legal fees
- Investment Counsel Fees (Non-Registered Accounts)
- Interest expense on investment loans
- Union dues receipts
- Professional membership fee receipts
- HOME OFFICE EXPENSE - TEMPORARY COVID-19 - max \$500 for 2022**

DISPOSALS RESULTING IN CAPITAL GAINS OR LOSSES

- Applies to disposals of shares, real estate, bonds etc
- Provide the following for each disposal:
 - Description of asset
 - Purchase cost
 - Selling price
 - Selling costs
 - V-Day Value (Dec 1971) if applicable

FOREIGN OR OFFSHORE TRUSTS

- * Did you loan or transfer property to an offshore foreign trust in 2022 or any other year?
- * Did you receive a distribution or loan from an offshore trust in 2022 or any prior year?
- * Do you have foreign property (excluding personal vacation property) with a total cost of more than \$100,000 CDN?
- * Do you have an interest in a foreign affiliate?

(Y/N)

PERSONAL EXEMPTIONS

- Provide details of spouse's income (if applicable) unless we prepare the return
- Disability tax credit - do you qualify? (require Form T2201 if first year of claim)

****Direct Deposit: If direct deposit has not yet been set up with on your CRA account, please provide us with a void cheque. CRA is moving toward direct deposits as a requirement. You will have the ability to update any time during the year using CRA My Account as well.**

ELECTIONS CANADA (please circle)
 * Are you a Canadian Citizen? (YES/NO)
 * Do you authorize CRA to provide your name, address and date of birth to Elections Canada to update your information currently on the national Register of Electors? (YES/NO)

Are you a US Citizen? (YES/NO)

Did you sell your principal residence in 2022? (YES/NO)

Do you have dependants? If yes, provide Name, SIN, Relationship and DOB:

Did you have a change in use of any of your properties in 2022? (YES/NO)

Do you want a paper copy or electronic copy of your T1 Summary (additional processing fees may apply) (PAPER / EMAIL)

