

**T1 INFORMATION CHECKLIST 2023**

NAME \_\_\_\_\_  
 SPOUSE \_\_\_\_\_  
 TELEPHONE \_\_\_\_\_

SIN \_\_\_\_\_  
 SPOUSE SIN \_\_\_\_\_  
 EMAIL \_\_\_\_\_

- GENERAL**
- Please provide entry or departure dates if you did not reside in Canada throughout 2023
  - Did you move during 2023
  - 2023 tax instalments paid (T7D)
  - 2022 Notice of Assessment unless retained by our office
  - Please provide details of change of marital status in 2023. Married? Divorced? Separated? (Y/N)
  - Your 2022 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 2023?
  
  - Did you sell real estate in 2023?
  - Will you need to file a Underused Housing Tax return?
  - In 2023, were there any children born or adopted in your family?

- WERE YOU SELF EMPLOYED?**
- Attach financial statements if not prepared by us
  - Do you have a Business Number?
  - Are you a GST registrant?

- DID YOU RECEIVE ANY OF THE FOLLOWING INCOME?**
- Salary, wage or commissions (T4)
  - Old Age security (T4A OAS)
  - Foreign Income including Pensions

- ALLOWABLE DEDUCTIONS/CREDITS (if applicable)**
- Commission/employment expenses (must have signed T2200 by employer)
  - Political donation receipts (BC and Federal)
  - RRSP receipts - March-Dec 2023 plus 1st 60 days of 2024
  - Did you contribute to an FHSA account (First time home buyers plan)
  - Did you open an FHSA account (First time home buyers plan)
  - Charitable donation receipts
  - Donations of publicly listed shares or investment products
  - Medical Receipts - Please request detailed print out from Pharmacy

- 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
- FHSA withdrawals (First time home buyers)
- Other income

- 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 - must include T2200**

- FOREIGN OR OFFSHORE TRUSTS**
- \* Did you loan or transfer property to an offshore foreign trust in 2023 or any other year?
  - \* Did you receive a distribution or loan from an offshore trust in 2023 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)


- 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

- 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 2023? (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 2023? (YES/NO)
Do you want a paper copy or electronic copy of your T1 Summary (additional processing fees may apply) ( PAPER / EMAIL )	

