

This checklist has been designed to help you gather information for your tax return. Please review this checklist prior to bringing your documents in to our office. Tax credits and reporting requirements are constantly changing. This organizer will assist us in claiming all the tax deductions you qualify for and comply with reporting requirements.

**1. Personal Information**

Name			Phone
<b>Taxpayer</b>			Home:
<b>Spouse</b>			Work:
<b>Address</b>			Cell:
			Cell:
<b>Email</b>			

**Marital Status:** Married Single Common-law Separated Divorced Widowed

**Note: You are considered to be living common-law if you have been living with someone for 12 consecutive months**

To best maximize credits, it is ideal that we prepare both parties tax returns.

Did your Marital Status Change during the year? MM/DD \_\_\_\_\_ Yes No

Are you a U.S. citizen, Green Card Holder, or were you, or your parents born in the U.S.? Yes No

Are you disabled? If yes, have you applied for the disability certificate (T2201)? Yes No

Charitable donations? - Attach receipts. Yes No

**New for 2023**

First home savings account (FHSA) contibution T4FHSA Slip Yes No

Multigenerational home renovation tax credit - certain expenditures up to \$50,000

Did you sell your home less than 365 days after purchased? Yes No

will be deemed to be business income unless a particular exception is met such as due to death, separation, birth, illness or employment change

Consent to share contact information -Organ and tissue donor registry

Does the taxpayer authorize CRA to provide your name and email address to Ontario Health (Trillium Gift of Life) so they may contact you or send you information about organ and tissue donation **If we do not have an email address for spouse we will answer NO for them**

Name \_\_\_\_\_ Yes No

Name \_\_\_\_\_ Yes No

**2. Residence**

Did you sell your home during the year Yes No

If **yes** Complete Section 8 on page 2

Property taxes? Paid to: \_\_\_\_\_ Amount: \_\_\_\_\_ Yes No

Rent? Attach receipts Yes No

**3. Medical Expenses**

Prescriptions, [ask Pharmacy](#) for printout of years purchases Yes No 1 of 3

Dental, <a href="#">ask for printout</a> of years transactions	Yes	No
Retirement or Nursing Home, attach receipt/letter	Yes	No
Health Benefit Premiums (if Yes , provide statement)	Yes	No
Out of Country Medical premiums - (If yes, provide statement)	Yes	No
Home Accessibility Tax Credit - Renovations to improve access and mobility	Yes	No
If yes include receipts - we will determine eligibility maximum \$20,000 for 2022 examples: wheel chair ramps, walk in tubs, grab bars		

#### 4. Foreign Reporting

Did the taxpayer own or hold foreign property with a total cost of more than CDN \$100,000 at any time during the year? Foreign property includes cash, stocks, trusts partnerships, real estate (other than for personal use) and an account with a Canadian securities dealer.	Yes	No
If yes, provide details and contact your financial advisor for applicable reports.	Yes	No

#### 5. Pension Income

T4A - Pension, retirement and annuity income?	Yes	No
T4A(P) - Canada pension plan benefits?	Yes	No
T4A(OAS) - Old age security slip?	Yes	No
T4A(RCA) - Retirement compensation arrangements?	Yes	No
T4RSP - Registered retirement savings plan?	Yes	No
T4RIF - Registered retirement income fund income?	Yes	No
Does the taxpayer elect to split eligible pension income with his/her spouse or common-law partner?	Yes	No
Foreign pension? Attach supporting documents.	Yes	No
T5007 - Social assistance?	Yes	No

#### 6. Investment Income/Deductions

T3 - Income from mutual funds?	Yes	No
T5 - Investment income?	Yes	No
T4PS - Income from profit sharing plans?	Yes	No
T5013 - Partnership income?	Yes	No
T5008 - Income from securities transactions?	Yes	No
Did you dispose of any investments during the year? (Excl. RRSP, RRIF, TFSA)	Yes	No
If yes, provide details and contact your financial advisor for a " <u>Realized Gains/Loss</u> " report		

Interest to earn Management  
investment income \$ \_\_\_\_\_ fees paid \$ \_\_\_\_\_

Did you change your financial planner during the year? Contact info \_\_\_\_\_

#### 7. Prior Year Tax Return Information and Correspondence

Is a copy of the Notice of Assessment for last year's tax return attached?	Yes	No	
Is a copy of any other correspondence from the Canada Revenue Agency attached?	Yes	No	2 of 3

Is your statement of installments paid for last year attached?  
(included with your notice for the current year requirements, received in January)

Yes

No

## 8. Did you sell your home during the year

If yes provide the following information:

Address of the property \_\_\_\_\_

Year the property was purchased \_\_\_\_\_

Proceeds of disposition

Date sold

\$ \_\_\_\_\_

\_\_\_\_\_  
MM/DD

**This checklist has been prepared to guide you in gathering your documents and other information that will be required for us to prepare your personal tax return. There may however be other information that is required to be reported on your return.**





