

Personal Income Tax Checklist

Please use this checklist to ensure you have all receipts, income records, and tax documents we will need to prepare your 2023 personal tax return.

When you provide us with your 2023 tax information, please ensure that we have all your current contact information, including phone number, email, and mailing address.

We will also need to know your marital status. If it changed in 2023, we need to know the date.

If you have dependents (children or other relatives) we will need to know their names, birth dates, and relationship to you. In some cases, we will need to know what their 2023 Net Income was (Line 23600 from their 2023 tax return).

Do you have the following documents?

- Employment (T4)
- Pension (T4A, T4A(P), T4A(OAS))
- Scholarships, Bursaries, or RESP (T4A)
- Employment Insurance (T4E)
- Dividends / Interest (T5)
- RRSP / RRIF (T4RSP, T4RIF)
- Mutual Funds / Trusts / Estates (T3)
- Partnerships / Tax Shelters (T5013)
- WCB / Social Assistance (T5007)
- Other _____

Receipts for the following:

- RRSP Contributions (Mar 2023-Dec 2023 / 1st 60 days of 2024)
- Union / Professional Dues (not included on T4)
- Child Care Expenses
- Moving Expenses (at least 40km closer to work)
- Investment Mgmt Fees (non-registered accts only)
- Interest Paid on Investments (non-registered accts only)
- Tuition (for self or dependent, need T2202A slip)
- Student Loan interest
- Medical / Attendant Care Expenses
- Charitable / Political Donations
- Other _____

Documents for the following transactions:

- Real Estate — sales or purchases (including information on principal residence sale or change of use)
- Realized Gains/Losses Summary (for stocks / bonds / mutual funds)
- Support Payments Received / Paid (need court document)
- Disability Tax Credit (CRA eligibility confirmation)
- Foreign Income / Pension (slips, country, currency)
- T1135 Foreign Holdings information (broker can provide)
- Other _____

Provide details of:

- Employment Expenses (signed T2200 from employer)
- Rental Income and Expenses (including suite)
- Self-Employed Business Income and Expenses (GST?; auto use [bus.km/tot.km]; office in home use [sq.ft.office/tot.sq.ft.house])
- Copy of prior year Notice of Assessment
- Instalments paid for 2023 tax year
- Home Buyers Plan or Lifelong Learning Program required repayments
- Sharing economy income (Air BnB, VRBO, Uber, etc.)
- Bitcoin / other cryptocurrency transactions
- Other _____