



**2023 PERSONAL INCOME TAX RETURN CHECKLIST**  
 (For each item that applies, please provide applicable supporting documentation)

**Information slips:**

- |  |        |  |        |
|--|--------|--|--------|
| <input type="checkbox"/> Employment income                         | T4     | <input type="checkbox"/> Interest and Dividend Income            | T5     |
| <input type="checkbox"/> Pension, Retirement, Annuity & Other Inc. | T4A    | <input type="checkbox"/> Trust, Estate or Mutual Fund Income     | T3     |
| <input type="checkbox"/> Canada Pension Plan benefits              | T4AP   | <input type="checkbox"/> Workers' Compensation benefits          | T5007  |
| <input type="checkbox"/> Old Age Security benefits                 | T4AOAS | <input type="checkbox"/> Partnership income                      | T5013  |
| <input type="checkbox"/> Employment insurance benefits             | T4E    | <input type="checkbox"/> Securities transactions                 | T5008  |
| <input type="checkbox"/> Fishing income                            | T4F    | <input type="checkbox"/> Tuition / Education amounts certificate | T2202A |
| <input type="checkbox"/> RRIF Income                               | T4RIF  | <input type="checkbox"/> Other: _____                            |        |
| <input type="checkbox"/> RRSP Income                               | T4RSP  | <input type="checkbox"/> Other: _____                            |        |

**Other income:**

- |  |   |
|--|---|
| <input type="checkbox"/> Other Employment income or Taxable Benefits | <input type="checkbox"/> Pensions (other than reported on T slip)                                       |
| <input type="checkbox"/> Business or Professional Income & Expenses  | <input type="checkbox"/> Interest earned but not received (bonds, term deposits, T-Bills, mutual funds) |
| <input type="checkbox"/> Partnership Income                          | <input type="checkbox"/> Capital Gains and Losses   |
| <input type="checkbox"/> Rental Income & Expenses                    | <input type="checkbox"/> Other: _____   |
| <input type="checkbox"/> Alimony and/or Child Support income         |   |

**Other expenses:**

- |  |   |
|--|---|
| <input type="checkbox"/> RRSP Contributions (include receipts up to Feb. 29, 2024) | <input type="checkbox"/> Home office details if worked from home due to COVID-19  |
| <input type="checkbox"/> Professional and/or union dues                            | <input type="checkbox"/> Medical/Dental expenses including insurance premiums     |
| <input type="checkbox"/> Childcare expenses  | <input type="checkbox"/> First Home Savings Account Contributions                 |
| <input type="checkbox"/> Moving expenses (if moved >40 km for work)                | <input type="checkbox"/> Interest paid on Canada Student Loans                    |
| <input type="checkbox"/> Alimony and/or Child Support payments                     | <input type="checkbox"/> Charitable donations &/or Political Contributions        |
| <input type="checkbox"/> Interest on money borrowed to earn investment income      | <input type="checkbox"/> Costs related to Home Accessibility of a Disabled Person |
| <input type="checkbox"/> Investment counsel/management fees (unregistered plans)   | <input type="checkbox"/> Physical activity expenses (\$2,000 max/family)          |
| <input type="checkbox"/> Employment expenses (please provide signed T2200 form)    | <input type="checkbox"/> Other: _____   |

**Information relating to declarations or claims:**

- Inform us of any changes in your personal information: home vs. mailing address, phone number, marital status, dependants, etc.
- Ensure we are aware of your Canadian Citizenship status and whether you would like to be included in the list of eligible voters.
- Ensure that we have the names, dates of birth, and social insurance numbers of all children under age 18.
- If one of your dependants was in full-time attendance at a university or college, please provide details concerning dependant's net income and tuition and education information (ie. Form T2202A). Please ensure form is signed by the student.
- Details of any capital gains and losses realized in 2023 including annual investment summary from broker.
- Inform us if you have sold any property, including your own residence, a rental or vacation property, during 2023.
- Details regarding RRSP Home Buyers' Plan or Lifelong Learning Plan withdrawals.
- Inform us if you have opened a First Home Savings Account (FHSA) during the year.
- If you purchased a home and did not own a home in the preceding four years, you may be eligible for the new first-time home buyer's credit. Please provide us with information to verify your home purchase.
- Details of foreign property owned at any time in 2023 including cash, stocks, trusts, partnerships, real estate, tangible and intangible property, contingent interests, convertible property, etc. Please provide details of income amount by country.
- Details of income from, or distributions to, foreign entities such as foreign affiliates and trusts.
- Inform us if you are a volunteer firefighter or a search and rescue volunteer.
- If you or any of your dependants are disabled, has a disability tax credit certificate been obtained?
- If you provided in-home care for a parent or grandparent (including in-laws) 65 years of age or over who is dependant on you because of a mental or physical infirmity, or an infirm dependant relative, please provide details of relative including, name, relationship to you, Social Insurance Number and net income.

**Information received from Canada Revenue Agency:**

- Receipts for or Summary of 2023 income tax instalments or payments of tax
- 2022 Assessment Notice and any other CRA correspondence