



**NEW CLIENT
2023 PERSONAL INCOME TAX RETURN CHECKLIST**

Name: _____
 S.I.N.: _____
 Current address: _____
 City and postal code: _____
 Email address: _____
 Birthdate: _____
 Telephone: Home _____ Work _____ Cell _____

Marital Status: Single _____ Married _____ Divorced _____ Separated _____ Common-law _____

If your marital status has changed during 2023, the date of change _____

A. FAMILY PROFILE

PLEASE COMPLETE THIS SECTION

SPOUSE/PARTNER

Name _____
 Birthdate _____
 S.I.N. _____
 2023 income _____

CHILDREN

	<u>1.</u>	<u>2.</u>	<u>3.</u>	<u>4.</u>
Name	_____	_____	_____	_____
Birthdate	_____	_____	_____	_____
2023 income	_____	_____	_____	_____
Infirmity (Yes or No)	_____	_____	_____	_____
Separate	_____	_____	_____	_____
Return (Yes or No)	_____	_____	_____	_____

OTHER DEPENDANTS

	<u>1.</u>	<u>2.</u>	<u>3.</u>	<u>4.</u>
Name	_____	_____	_____	_____
Birthdate	_____	_____	_____	_____
2023 income	_____	_____	_____	_____
Infirmity (Yes or No)	_____	_____	_____	_____
Relationship to you	_____	_____	_____	_____



B. INCOME

DID YOU RECEIVE ANY OF THE FOLLOWING TYPES OF INCOME IN 2023?

	<u>YES</u>	<u>NO</u>	<u>INFORMATION SLIP(S)</u>
1. Salary/wages (Include commissions)	___	___	T4, T4A
2. Interest/dividends	___	___	T5, T4PS, T3, T600
3. Rental income	___	___	Details of revenue and expenses
4. Limited partnership	___	___	T5013, details
5. Income from: Self-employment Partnership Farming Fishing	___ ___ ___ ___	___ ___ ___ ___	Financial statements or details of revenue and expenses
6. Director/management fees	___	___	T4A
7. Pension income: C.P.P. O.A.S. R.P.P. R.R.I.F. Annuities Foreign	___ ___ ___ ___ ___ ___	___ ___ ___ ___ ___ ___	T4A(P) T4A(OAS) T4A or other T4(RIF) Various Details
8. Estate/trust/mutual fund income	___	___	T3
9. E.I. benefits	___	___	T4E
10. Research grants/ scholarships/bursaries/ fellowships	___	___	T4A, details
11. Income from: R.R.S.P. I.A.A.C. D.P.S.P. R.E.S.P. R.R.I.F.	___ ___ ___ ___ ___	___ ___ ___ ___ ___	T4(RSP) T4(PS) T4(RES) T4(RIF)
12. Alimony/maintenance	___	___	Separation agreement



C. SALES

DID YOU SELL ANY OF THE FOLLOWING TYPES OF PROPERTIES IN 2023?

	<u>YES</u>	<u>NO</u>	<u>DATE OF SALE(S)</u>	<u>INFORMATION</u>
1. Real estate (including principal residence)	___	___	_____	Details required: - Selling cost/statement of adjustments, etc.
2. Stock/ bonds/etc.	___	___	_____	- Original cost and selling costs (annual trading summaries)
3. Other	___	___	_____	

Elections Canada (This information can be used only for electoral purposes)

Are you a Canadian Citizen? Yes ___ No ___

If you are a Canadian Citizen, do you agree to the Canada Revenue Agency providing, over the next 12 months, your name, address, and date of birth to Elections Canada to keep your information current on the National Register of Electors?

Yes ___ No ___

Specified Foreign Property

Did you own or hold foreign property (including stocks, bonds, real estate) **at any time** in 2023 with a total cost of more than CAN\$100,000?

Yes ___

No ___



D. DEDUCTIONS

DID YOU MAKE ANY OF THE FOLLOWING TYPES OF PAYMENTS IN 2023?

	<u>YES</u>	<u>NO</u>	<u>INFORMATION SLIP(S)</u>
1. Investment expenses:			
Interest	___	___	Details and receipts
Management fees	___	___	Details and receipts
Accounting fees	___	___	Details and receipts
Investment counsel fees	___	___	Details and receipts
2. R.R.S.P.:			
- Contribution	___	___	Official receipt
- Repayment of home buyer's plan	___	___	Official receipt
3. Union dues	___	___	Receipt
4. Professional fees	___	___	Receipt
5. Tuition fees:			
Self	___	___	T2202, T2202A
Dependent	___	___	T2202(A) signed by dependent
6. Moving expenses	___	___	Original receipts/old location & New location of residence and Old location & new location of place of work
7. Employment expenses:			
Travel	___	___	T2200(signed by employer) Receipts
Entertainment	___	___	as above
Other	___	___	as above
8. Alimony/maintenance	___	___	Copy of separation agreement
9. Child care expenses	___	___	Payee/S.I.N./amount
10. Political contribution	___	___	Official receipt(s)
11. Charitable donation	___	___	Official receipt(s)
12. Medical expenses	___	___	Receipts
13. Tax instalments	___	___	Statement of account