



2022 Personal Tax Return Checklist

Name(s) _____
 Address _____
 Email Address _____ Phone# _____ Cell# _____

Please answer all questions and provide details:

Details/additional information

Did your marital status change in 2022
(including common law)?
(Please provide a copy of separation agreement) Yes No _____

Do you have any new dependants? Yes No _____

Are you a Canadian Citizen? Yes No _____

If you are a Canadian Citizen, do you
want your name, address, and date of birth
provided to Elections Canada? Yes No _____

Did you own any foreign property at any time in
2022 (eg. foreign investments, real estate, etc.)? Yes No _____

If your banking information changed in 2022, would
you like us to update your direct deposit information? Yes No _____

INCOME:

Have you provided us with all of the T4,
T5 and/or T3 slips that you expect to receive? Yes No _____

Did you sell any stocks or bonds? Yes No _____

Did you sell any real estate (other than your home)? Yes No _____

Did you buy a new home? Yes No _____

Did you sell your home (principal residence)? Yes No _____

Please provide: address, year of acquisition,
original purchase price, proceeds of disposition) _____

Did you have any other sources of income in 2022? Yes No _____

PLEASE SEE THE BACK OF THIS FORM FOR ADDITIONAL QUESTIONS AND TO ADD ANY OTHER INFORMATION



DEDUCTIONS AND CREDITS:

- Did you make an RRSP contribution for 2022? Yes No _____
- Did you pay any tax installments? Yes No _____
- Did you work from home during 2022 due to Covid-19? (if you are an employee)
- Please provide: dates worked at home,
 T2200S or T2200 (if applicable) Yes No _____

Have you provided us with information regarding:

- Are you an apprentice? Yes No _____
- Interest **paid** on loans used for investing Yes No _____
- Investment management fees Yes No _____
- Union dues Yes No _____
- Tuition fees (yourself or dependant) Yes No _____
- (Please have student sign before bringing in)**
- Moving expenses Yes No _____
- Employment expenses Yes No _____
- Alimony (spousal support) Yes No _____
- Childcare (daycare, camps) Yes No _____
- Donations/political contributions Yes No _____
- Medical expenses (including travel) Yes No _____
- Do you have a medical plan? Yes No _____
- RRSP (including Home Buyers plan repayment) Yes No _____
- Trades person's tool expenses Yes No _____
- Volunteer firefighter's amount Yes No _____

ADDITIONAL INFORMATION:
