

2023 Personal Income Tax Preparation Checklist

Individual (I)

Spouse (S)

INSTRUCTIONS

All Clients:

1. Watch instructional video,
2. Fill in form and send with supporting documents through e-Courier,
3. For pages 2-4, please enter the number of each type of document under I (Individual), S (Spouse) or J (Joint).

New Clients:

1. Please enter as much information as possible,
2. Include copies of two pieces of government issued ID, including one piece of photo ID (SIN Card, Passport, BC Services Card, etc.) with supporting documents.
3. Previous year tax return / Notice of assessment

Returning Clients:

1. Enter your name,
2. Enter any items which have changed since our last communication. If an item is not entered, we will assume that there is no change.

Special Notes

Legal name: (Last, First)

(As per your previous year notice of assessment)

Nicknames:

Gender:

Cell phone:

Email address:

Social insurance no:

Date of birth

Home address

Street Address:

City

Province

Postal Code

Home phone:

Marital status:

(As of December 31, 2023)

If your marital status changed in 2023, enter:

Date of change:

Previous status:

Did you have/adopt a child?

(If yes, please fill in [dependent worksheet](#).)

Province/country of residence:

(As of December 31, 2023)

Date of change in residency

(For date of landing, please include supporting documentation, such as record of landing or plane ticket)

General Questions

	I	S
Canadian citizen?		
Any capital gain / loss?		
Provide info to Elections Canada?		
Any bank account info change? (If so, please enter details on page 4.		
Any foreign assets > \$100,000 (T1135 required) If YES, complete the relevant T1135 worksheet .		
Was there any disposition of principal residence?		
Did you open a first home savings account (FHSA)?		
Did you rent a home in 2023?		

Income

Please enter the number of each document under I (Individual), S (Spouse) or J (Joint Name).

	I	S	J	Comments
T3 Trust income				
T4 Employment income				
T4A Pensions and other				
T4A(P) CPP income				
T4(OAS) Old age security				
T4E Employment insurance benefits				
T4FHSA First home savings account				
T4RIF RRIF withdrawals				
T4RSP RRSP withdrawals				
T5 Investment income				
T5007 Social benefits payments				
T5008 Securities transactions (trading summary)				
T5013 Partnerships				
Capital dispositions (shares / other capital)				
Foreign employment / Pension / Investment income				
Details of foreign investments (foreign investment summary)				
Foreign tax slips / Supporting documents				
Rental income and expenses (worksheet required)				
Self-employment (worksheet required)				
Spousal support received				
Other income items (please specify)				

Deductions

	I	S	J	Comments
Allowable business investment loss (ABIL) info				
Carrying charges and interest expenses				
Child care / Attendant care receipts				
Clergy residence (T1223E required)				
Employment expenses (T2200 required)				
Labour mobility deduction (LMD)				
Moving expenses (T1-M required)				
Past service contributions to RPP				
Professional dues & union dues				
RRSP receipts				
Spousal & child support payments				
Other deductions (please specify)				

Non-refundable Tax Credit

	I	S	J	Comments
Adoption expenses				
Canada caregiver amount (see dependent form)				
Charitable donations				
Disability credit (T2201) / Infirm dependent over 18				
Digital news subscription credit (until 2024)				
Eligible educator school supply tax credit				
BC renter's tax credit (For renters with \$80,000 or less income)				Please provide rental address, rent paid, months at tenancy & name of landlord.
Home accessibility expenses				
Home buyer amount				
Interest paid on student loans				
Medical expenses				
Political contributions				
Tuition / Education amount (T2202A)				

Additional Tax Info

	I	S	J	Comments
1994 Capital gain exemption info.				
Foreign company shares & financial statements				
GST related information				
Home buyers / Lifelong learning plan RRSP withdrawal				
Principal residence disposition information				
Tax instalment payments made				

Bank Account Number

1. Only for new clients.
2. Please attach Void Cheque.

Branch number: (5 digits)

Institution number: (3 digits)

Account number: (maximum 12 digits)

Name on account: