

Dates & Reminders

December 2023 to April 2024

Dates	Tasks
December 2023	<ul style="list-style-type: none">• Update automobile mileage record• Contribute to RESPs• Convert your RRSP to a RRIF if you have turned 71 in 2023; otherwise, your entire RRSP will be considered taxable• Make one last top-up contribution to your RRSP, if you have turned 71 in 2023• Make sure that all donations are made by December 31, 2023, in order to realize the tax benefits on your 2023 return• Consider making gifts of listed securities such as common shares and mutual funds to registered charities in order to receive a special tax benefit• Review your investment portfolio to determine any equities for which you want to lock in the losses before December 16, 2023
January 2024	<ul style="list-style-type: none">• Contact our office to obtain information about T1135 if you need to file one for 2023• Have employer complete T2200 if planning to deduct employment expenses• Gather your personal tax information• Consider contributing \$7,000 in 2024 to a tax-free savings account
February 2024	<ul style="list-style-type: none">• File T4s and T4 Summary by February 29, 2024
March 2024	<ul style="list-style-type: none">• Make 2023 RRSP contribution by February 29, 2024• Book an appointment with us in early or middle of March
April 2024	<ul style="list-style-type: none">• It is best to contact us before April 1, 2024 to ensure returns are filed in a timely manner• April 30, 2024 is the filing deadline for personal tax return if you have tax payable or are not carrying on a business in 2023