

## **Canadian Personal Income Tax Return Checklist**

Taxpayer Name:	Spouse's Name:								
Date of Birth:	Date of Birth:								
Email:	Email:								
Phone:	Phone:								
Address:	Children SIN Date of Birt					th			
Marital Status:									
		l							
Please answer the following questions									
Are you a Canadian citizen?					No				
If yes, can the CRA provide your name, address, and date of birth to Elections Canada?					No				
At any time during the year, did you own foreign property with a combined cost greater than					No				
\$100,000? (e.g. real property, securities, foreign bank account, etc.) <i>If yes, attach details</i> .									
At any time during the year, did you receive, sell, send, exchange, or otherwise acquire any					No				
financial interest in any virtual currency? If yes, attach details (see below).									
Do you wish to pension split if beneficial?					No	П			
Have you sold or changed use of your principal residence during the year? (home or vacation					No	一			
property). If yes, please provide sales documents.									
Are you a first-time homebuyer this year?					No				
Did you pay rent for a period of six months or more in 2023?					No				
Have you <b>signed and enclosed</b> your Engagement Letter?					No				
How would you like to receive your copy of the tax return?									
How would you like to receive your copy of the tax return:	:			PDF (secured) Paper					
Did COVID 10 related as we sate	OVID 10 related records from the government?				No				
Did you receive (or repay) any COVID-19 related payments from the government?  If yes, please provide a copy of the related slip (eg: T4A) or provide explanation.					NO	Ш			
					No				
For self-employed individuals: Did you receive (or repay) the Canadian Emergency Business					NO	Ш			
Account Loan (or any other government/grant business funding)? If yes, please provide documentation.									
Canadian and Foreign Sources of Income (provide slips, documents, or details)									
		cuments, or aetail	<i>S)</i>						
Employment related income (T4, T4E)	Capital gains								
Investment income (T3, T5) including backup	Provide proceeds, actual cost, commission fees, dates of acquisition and disposition of stocks/bonds/mutual funds,								
attachments	real estate, personal property, jewelry, works of art, etc.)								
Pension/retiring allowance/other (T4A)	real estate, personal property, jeweny, works of art, etc.)								
CPP/QPP/OAS (T4A(P)/T4A(OAS))	Distributions from a foreign trust								
RRSP/DPSP/RPP/RRIF (T4RSP/T4RIF)	Business/professional income/expenses								
Partnerships/tax shelters (T5013/T101)	Auto expenses – including business/personal mileage								
Rental income/expenses	Home office expenses:								
Farming/fishing income/expenses	Square feet: Office space Total home								
Virtual currency – provide details of how the investment is held (eg: exchange, online platform, wallet).									
Provide transaction details including buy/sell transactions, highest cost based during the year, gains/losses and other income earned.  **Deductions and Credits (provide slips, documents, or details)**									
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RRSP/pension contributions		Tuition fees/education expenses (include T2202A)					
Union/professional dues		If transferring to parent, has child signed the T2202A?					
Childcare expenses		(include T11A for tuition paid to university outside of Canada)					
Moving expenses		Interest paid on student loans					
Support payments made		Medical/attendant care expenses/travel medical insurance					
Accounting/legal/investments counsel fees		If aged 65 or disabled: home accessibility expenses					
Interest paid on investments		Income tax instalments/foreign taxes paid					
Deductible employment expenses (include T2200)		Number of days spent in the US if greater than 120 in current or two previous years					
Charitable donations		Prior year Notice of Assessment or Notice of Reassessment					
Political/municipal contributions		Other					
•							
Please add Additional Information							
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