

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 Birth
Marital Status:			

Please answer the following questions

Are you a Canadian citizen?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If yes, can the CRA provide your name, address, and date of birth to Elections Canada?	Yes <input type="checkbox"/> No <input type="checkbox"/>
At any time during the year, did you own foreign property with a combined cost greater than \$100,000? (e.g. real property, securities, foreign bank account, etc.) <i>If yes, attach details.</i>	Yes <input type="checkbox"/> No <input type="checkbox"/>
At any time during the year, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? <i>If yes, attach details (see below).</i>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you wish to pension split if beneficial?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Have you sold or changed use of your principal residence during the year? (home or vacation property). <i>If yes, please provide sales documents.</i>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are you a first-time homebuyer this year?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Did you pay rent for a period of six months or more in 2023?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Have you signed and enclosed your Engagement Letter?	Yes <input type="checkbox"/> No <input type="checkbox"/>
How would you like to receive your copy of the tax return?	PDF (secured) <input type="checkbox"/> Paper <input type="checkbox"/>
Did you receive (or repay) any COVID-19 related payments from the government? <i>If yes, please provide a copy of the related slip (eg: T4A) or provide explanation.</i>	Yes <input type="checkbox"/> No <input type="checkbox"/>
For self-employed individuals: Did you receive (or repay) the Canadian Emergency Business Account Loan (or any other government/grant business funding)? <i>If yes, please provide documentation.</i>	Yes <input type="checkbox"/> No <input type="checkbox"/>

Canadian and Foreign Sources of Income (provide slips, documents, or details)

Employment related income (T4, T4E) <input type="checkbox"/>	Capital gains <input type="checkbox"/>
Investment income (T3, T5) including backup attachments <input type="checkbox"/>	Provide proceeds, actual cost, commission fees, dates of acquisition and disposition of stocks/bonds/mutual funds, real estate, personal property, jewelry, works of art, etc.)
Pension/retiring allowance/other (T4A) <input type="checkbox"/>	Distributions from a foreign trust <input type="checkbox"/>
CPP/QPP/OAS (T4A(P)/T4A(OAS)) <input type="checkbox"/>	Business/professional income/expenses <input type="checkbox"/>
RRSP/DPSP/RPP/RRIF (T4RSP/T4RIF) <input type="checkbox"/>	Auto expenses – including business/personal mileage <input type="checkbox"/>
Partnerships/tax shelters (T5013/T101) <input type="checkbox"/>	Home office expenses: <input type="checkbox"/>
Rental income/expenses <input type="checkbox"/>	Square feet: Office space _____ Total home _____
Farming/fishing income/expenses <input type="checkbox"/>	
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)	

