

PERSONAL INCOME TAX CHECKLIST – 2023

Deadlines	April 30, 2024: 2023 income tax payment and filing deadline for individuals June 15, 2024: 2023 income tax and GST/HST filing deadline for self-employed individuals	
Tax Information Slips	Credits/Deductions	Other documentation
<input type="checkbox"/> T4 Slips <input type="checkbox"/> RRSP contribution slip <input type="checkbox"/> Employment Insurance benefits (T4E) <input type="checkbox"/> Interest, dividends, mutual funds (T3, T5) <input type="checkbox"/> Statement of Securities Transactions (T5008) <input type="checkbox"/> Tuition/education receipts (T2202A) <input type="checkbox"/> Old Age Security and CPP benefits (T4A-OAS, T4AP) <input type="checkbox"/> Other pensions and annuities (T4A) <input type="checkbox"/> Social assistance payments (T5007) <input type="checkbox"/> Workers' compensation benefits (T5007) <input type="checkbox"/> All other tax information slips	<input type="checkbox"/> Professional or union dues <input type="checkbox"/> Medical expenses <input type="checkbox"/> Charitable donation receipts <input type="checkbox"/> Political contributions <input type="checkbox"/> Childcare expenses for children under 16 <input type="checkbox"/> Interest paid on student loans <input type="checkbox"/> Interest paid for any investments <input type="checkbox"/> Office-in-home expenses (if applicable) <input type="checkbox"/> Exams for professional certification <input type="checkbox"/> Tool expenses (Tradespersons) <input type="checkbox"/> Support for a child, spouse, or common-law partner <input type="checkbox"/> Eligible educator school supplies expense	<input type="checkbox"/> Summary of income earned and expenses incurred if you're a sole proprietor (T2125) - (Uber/Lyft or other) <input type="checkbox"/> Declaration of Conditions of Employment (T2200) <input type="checkbox"/> Disability Tax Credit Certificate <input type="checkbox"/> Direct deposit banking information (if it has changed) <input type="checkbox"/> Prior years' tax returns, if prepared elsewhere <input type="checkbox"/> If you are paying rent, please provide your landlord name and total rent paid <input type="checkbox"/> If you own your home, please provide the total property tax paid
		Additional Questions to review
		<input type="checkbox"/> Did you sell your principal residence in 2023? If yes, please provide the purchase price, sale value, year of purchase, date of sale. <input type="checkbox"/> Did you sell your investment property? If yes, please provide the purchase price, sale value, and your expenses to complete the sale. <input type="checkbox"/> Did buy or sell stocks or cryptocurrency (Bitcoin) in a non-registered account (non-RRSP/TFSA)? If yes, please provide the adjusted cost base at purchase and the proceeds from the sale.
New for 2023!	COVID-19 Benefits	T2200 Work from home
<input type="checkbox"/> FHSA (First Home Savings Accounts) contributions	<i>NOTE: Covid-19 Benefits no longer exist</i> <input type="checkbox"/> Repayments during 2023 can be deducted in 2023 or amended for the year received	<input type="checkbox"/> Work from home during 2023? <ul style="list-style-type: none"> Please provide T2200 completed by your employer. Please provide a summary of your work from home expenses for the year Please provide the sqft used for business and total sqft of your home.
Rental Property Details: Address _____ Rental Period _____		
1) Rental Income: _____ 2) Advertisement (realtor fees): _____ 3) Mortgage Interest: _____ 4) Property Tax: _____	5) Utilities (Gas, Hydro, and Water): _____ 6) House Insurance: _____ 7) Cable: _____ 8) Internet: _____	9) Mortgage Insurance: _____ 10) House Repair: _____ 11) Condo Maintenance Fees: _____ 12) House Alarm: _____



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