



Tax Return Checklist

Please provide your most recent income tax return Notice of Assessment from CRA if you have it.

Part A

Names(s): _____

Telephone number: home _____ cell _____

Email address: _____ **Do you prefer contact by phone or email?** _____

Did your address change in the tax year? If so, what is new address _____

SELL YOUR HOME?

If you sold your family home, how much did you sell it for? \$ _____

What year did you originally purchase the home you sold? _____

What was address of home you sold? _____

Do you want to change or initiate 'Direct Deposit' with CRA? _____ (include void cheque)

If we don't prepare your spouse's/partner's income tax return what is his/her approx income? \$ _____

MARITAL STATUS QUESTIONS:

Did your Marital Status change in the tax year? **If yes**, indicate date changed _____

If yes, did you? Get Married / Become Common Law / Separate / Become a Widow (circle one)

If you separated in the year, are you living at separate addresses? _____ Since what date? _____

If no, indicate marital status if we have not previously prepared your return _____

COVID-19 WORK FROM HOME

If you are employed, did you work from home due to COVID in 2022? Yes or No (circle one)

If Yes, for all of 2022? Yes or No (circle one) If not entire year, how many days? _____

If Yes, and you are a renter, please ask for the COVID renter work from home worksheet.

Are you a Canadian citizen? Yes / No (circle), If NO, status _____

Do you own foreign property worth more than cost of \$100,000? Yes / No (stocks, real estate, etc)

CHILDREN

Did you give birth or adopt a child in the tax year (circle one)? If yes, date _____ name _____
*****If you are a returning client SKIP to Part C.** Otherwise, answer following

New Client questions:

Your Birth date _____ Spouse/Partner Birthdate _____

Child 1: name _____ birth date _____

Child 2: name _____ birth date _____

Child 3: name _____ birth date _____

Does anyone claim the disability amount? _____

Are any of your children in day care or camps or have childcare? Provide receipts

If you are separated/divorced, please complete PART B, otherwise go to PART C

Part B (for separated/divorced clients)

Do you have a legal agreement or court order? _____ (If recent, provide us a copy)

Did you *receive* **spousal** support ? Year total? \$ _____

Did you *pay* **spousal** support ? Year total? \$ _____

Did you *receive* **child** support? Year total? \$ _____

Did you *pay* **child** support? Year total? \$ _____

Do you have primary (more than 60% of the time) or shared custody of your child(ren)? _____

Do you have an agreement with respect to who is claiming the child(ren) for the Amount for an Eligible Dependent? _____

If you have provided receipts for child care, etc and you did not pay the entire amount and intend to claim less than the receipted amount, please let us know about any arrangements with respect to what % you paid: _____

Part C

Please ensure you have included the following slips or information: (INCOME)

- IMPORTANT: If you have a trading summary and sold stocks during the year, PLEASE request a gains/losses summary from advisor**
- T4 slips from employment
- T4 (OAS) and T4 (CPP) slips – Old Age Security, CPP benefits
- T4A slips – Other Pensions, annuity and other income
- T4E – Employment Insurance
- T3 slips – Dividends and investment income

T5 slips – Interest and investment income

T4RSP slips – RSP income / withdrawals

*****Rental Income** – Do you have rental properties? ____ **Ask for Rental checklist if not included**

T5007 slips – Workers Comp

***Do you have your own **business** & not incorporated? **Ask for Self-Employment checklist**

Please ensure you have included the following slips or information: (DEDUCTIONS)

RRSP slips – contributions

Are you still repaying terms of the Home Buyer's Plan? _____ provide notice of assessment

Union or professional dues slips (not on T4)

Moving expenses (ask for **Moving Expenses'** list if moved more than 40KM for work or school)

Investment fees from non-registered investment advisor statement – Total for year \$_____

Interest on money borrowed to earn non registered investment income \$_____

Employment expenses – Does your employer require you to pay? Provide form **T2200**

Please ensure you have included the following slips or information: (Tax Credits)

Do any family members have student loans? Interest amount? \$_____

Do any family members attend post-secondary education? Provide T2202A from student account

Do any family members have medical expenses? Please provide all receipts! Not a list

** If you have pay into a HEALTH/DENTAL plan through your employer, please find out how much the premiums are? \$_____

Do you have any charitable donation receipts?

Are you a first-time homebuyer? If yes, month home purchased and address _____

Have you made any political contributions?

Are you a tradesperson that had to purchase tools?

OTHER:

Have any family members paid tax instalments to Canada Revenue Agency for 2022? If yes,

Name _____ how much \$_____ (provide CRA statement)

Are you a teacher and have receipts for eligible expenses? Provide list

“Let us worry about your taxes, so you don't have to”

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