

**2023 TAX RETURN CHECKLIST for 2022 INCOME TAX RETURN**

Name: \_\_\_\_\_ Phone Number: (\_\_\_\_) \_\_\_\_\_

**INFORMATION FOR 2022 INCOME AND DEDUCTIONS (INDICATE # OF SLIPS)**

Employment Income (T4)	_____	WCB/ Assistance Payments	_____
Old Age Security (T4AOAS)	_____	RRSP Contributions	_____
Canada Pension (T4AP)	_____	Union/ Professional Dues	_____
Foreign Pension Income	_____	Student Loan Interest	_____
Other Pension (T4A, T4RSP)	_____	Transit Passes (age 65+)	_____
RRIF Income (T4RIF)	_____	Investment Counsel Fees	_____
Investment Income (T5)	_____	Tuition Fees - Self (T2202A)	_____
Trust Income (T3)	_____	Tuition Fees - Dependant	_____
EI Income (T4E)	_____	Charitable Donations	_____
Universal Child Care Benefit	_____	Political Contribution	_____
Limited Partnership Income	_____	Investment Loan Interest Paid	_____
T5008	_____	COVID-19 Work-From-Home	_____
Ontario Staycation Hotel Receipts	_____		

Direct Deposit Banking Information. If not already provided, attach a VOID cheque. \_\_\_\_\_

Income Tax paid by Quarterly installment. If yes, include statement from Canada Revenue Agency) \_\_\_\_\_

Medical Expenses (If multiple prescriptions from same pharmacy, please obtain a year-end print out showing all prescriptions in 2022 per patient.) \_\_\_\_\_

**OTHER INFORMATION AND DETAILS REQUIRED**

**PLEASE ENCLOSE A COPY OF YOUR 2021 NOTICE OF ASSESSMENT FROM CANADA REVENUE AGENCY. NOTE: If you are registered for CRA online mail service, you will not have received a paper copy but instead must download it from your CRA online account.** (Needed for carry forward information, RRSP limits, & Home Buyers Plan)

**Did you dispose of any mutual funds, stocks, bonds, T-bills, real estate, or any other property in the year 2022?  
Did you have automatic withdrawals from mutual funds during 2022?**

If yes, please provide details of proceeds, cost of acquiring the property, selling expenses and enclose supporting documents. Financial institution will now normally issue a T5008 but may not show the cost base.

**Provide the following details:**

Did your marital status change during 2022? Yes \_\_\_ No \_\_\_

Net annual income of spouse, if not preparing their return. \$ \_\_\_\_\_

Name, date of birth, and social insurance number [SIN] of any child(ren) born in 2022. \_\_\_\_\_

Details of other Income for which no T-slips have been received (eg. other employment income, pension income, alimony, director fees, scholarships, bursaries, interest earned but not yet received etc.).

Details of other deductions (eg. moving expenses, alimony, pension plan contributions etc.).

**Did you incur childcare expenses in 2022?**

If yes, list amounts paid and name, address and SIN of person paid.

**Did you pay rent or property taxes in 2022?**

List amount paid in 2022, name of landlord or municipality.

**Will you be claiming a credit for the education and tuition fees of a dependant?** If yes, obtain signature of dependant on the back of form T2202A "Tuition and Education Credit Certificate" and provide details of dependant's income. The T2202A might not be mailed but instead may be found on the student's personal University or College on-line portal.

**Did you make a repayment or withdrawal** under RRSP Home Buyer's Plan or Life-Long Learning Plan during 2022?

If yes, provide details. \_\_\_\_\_

**Did you provide In-home care for a parent or grandparent (includes in-laws) 65 years of age or over?**

Someone who is infirm or a dependant relative in 2022? \_\_\_\_\_

What was the dependant's net income? \$ \_\_\_\_\_

State costs as a caregiver incurred including training costs. \_\_\_\_\_

**Did you receive/pay any alimony or maintenance allowance in 2022?**

If you are the Payer/Recipient, please provide name, social insurance number and address of recipient/payer.

Name \_\_\_\_\_ SIN# \_\_\_\_\_

Address \_\_\_\_\_

**Did you earn rental income in 2022?** If yes please include property address, gross rental income and all rental related expenses. \_\_\_\_\_

**Were you self-employed in 2022?** If yes, please include the gross revenue for the year and a statement listing all the related expenses incurred. You may deduct amounts paid for Private Health Services Plan coverage.

**Did you incur employment expenses that were not reimbursed by your employer in 2022?** If yes, provide a list of expenses and Form T2200 or Form T2200S signed by your employer.

**If you answered yes to either of the two questions above, did you incur:**

Automobile expenses? Yes \_\_\_ No \_\_\_ If yes, please provide the following details:

Total # Kilometres driven during year \_\_\_\_\_ Gas expense \_\_\_\_\_

Total # Kilometres driven to earn income \_\_\_\_\_ Insurance \_\_\_\_\_

Loan interest paid on auto loan \_\_\_\_\_ Licence \_\_\_\_\_

Repairs/Maintenance \_\_\_\_\_

Other Expenses (parking etc.) \_\_\_\_\_

Details of automobile bought or sold \_\_\_\_\_

Details of automobile lease \_\_\_\_\_

#### **DISABILITY TAX CREDIT APPLICATION-Form T2201**

If you or your dependents suffer from severe or prolonged mental or physical impairment, you may be entitled to a disability credit. Form T2201 must be completed by your physician to claim this credit.

#### **Pension Income Splitting**

Would you like your registered/pension income divided with your spouse if it is to your advantage? Yes \_\_\_ No \_\_\_

#### **Sale of Principal Residence**

Provide date of purchase, proceeds of disposition and a description of the property to claim the principal-residence exemption.

#### **PLEASE KINDLY ANSWER THE FOLLOWING:**

Would you like to E-file this year? Yes \_\_\_ No \_\_\_

Do you own a Tax-Free Savings Account (TFSA)? Yes \_\_\_ No \_\_\_

If yes, name(s) of registered owner(s): \_\_\_\_\_

Did you own more than \$100,000 of foreign property in 2022? Yes \_\_\_ No \_\_\_

During the next 12 months, do you agree to Canada Revenue Agency (CRA) providing:

(1) your name, address, and date of birth to Elections Canada for the National Register of Electors? Yes \_\_\_ No \_\_\_

(2) your name and email address to Ontario Health for Ontario Health (Trillium Gift of Life) to contact you regarding organ and tissue donation? Yes \_\_\_ No \_\_\_

Are you registered for the CRA My Account? Yes \_\_\_ No \_\_\_

Are you registered for the CRA online mail service? Yes \_\_\_ No \_\_\_

If no, do you authorize registration to the CRA online mail service? Yes \_\_\_ No \_\_\_

If yes, to what email address? \_\_\_\_\_

**NOTE: If you register for CRA online mail service you will not receive a paper Notice of Assessment.**

Please use the area below for additional information or to answer any questions from above.

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