

# PERSONAL TAX CHECKLIST

PLEASE ENSURE THAT EMAIL ADDRESSES AND CELL PHONE NUMBERS ARE UNIQUE TO EACH TAX PAYER

### Primary Contact Information

Name: \_\_\_\_\_  
 Social Insurance No.: \_\_\_\_\_  
 Date of Birth: \_\_\_\_\_  
 Cell Phone: \_\_\_\_\_  
 Home Phone: \_\_\_\_\_  
 Email: \_\_\_\_\_

### Spouse Information (if applicable)

Name: \_\_\_\_\_  
 Social Insurance No.: \_\_\_\_\_  
 Date of Birth: \_\_\_\_\_  
 Cell Phone: \_\_\_\_\_  
 Home Phone: \_\_\_\_\_  
 Email: \_\_\_\_\_

How would you like to receive your tax return?  Electronically by email  Paper

How do you prefer to sign your T183 and other forms?  Electronically via DocuSign  Paper

Current mailing address: \_\_\_\_\_

Did you move during the year?  Yes  No

Previous address if you moved during the year: \_\_\_\_\_

Date of move: \_\_\_\_\_ Province of Residence on December 31<sup>st</sup>: \_\_\_\_\_

Did either of the following change during the year?

Marital Status: \_\_\_\_\_  Last Name: \_\_\_\_\_  
*(If yes, provide date of change)* *(If yes, provide new last name)*

Northern residents' deduction to claim:  Full  Half  None

| Dependent Name | Relationship | Social Insurance No. | Date of Birth |       |     |
|----------------|--------------|----------------------|---------------|-------|-----|
|                |              |                      | Year          | Month | Day |
|                |              |                      |               |       |     |
|                |              |                      |               |       |     |
|                |              |                      |               |       |     |
|                |              |                      |               |       |     |

|   | Primary | Spouse |
|---|---------|--------|
| Are you a Canadian citizen?   | Yes No  | Yes No |
| Do you authorize CRA to give your name, address, date of birth and citizenship to Elections Canada to update the National Register of Electors?   | Yes No  | Yes No |
| Did you own foreign property with a cost of \$100,000 or more at any time during the year? (includes U.S. property and investment portfolios with stocks or mutual funds with U.S. or International holdings)   | Yes No  | Yes No |
| Did you sell property (principal residence, rental property, vacation home, etc.) during the year?  | Yes No  | Yes No |
| Were you the legal owner (i.e. your name is on title with Land Titles) of a residential property in Canada, other than your principal residence, on December 31, 2022? Please also indicate if you have more than one principal residence. You may be required to file form UHT-2900. | Yes No  | Yes No |

|   |                 |                 |
|---|-----------------|-----------------|
| Do you have, or share custody of a child after a relationship breakdown?<br>Does this child live with you? <input type="checkbox"/> Yes <input type="checkbox"/> No<br>If yes, how often? <input type="checkbox"/> Full-time <input type="checkbox"/> Part-time | Yes No          | Yes No          |
| Has your banking information changed since your last direct deposit from CRA? If yes, please provide a <b>VOID</b> cheque or a Direct Deposit form from your bank.  | Yes No          | Yes No          |
| Did you pay personal tax installments during the year? If yes, \$_____  | Yes No          | Yes No          |
| Did you withdraw RRSP's to buy a home or to finance full-time education for you or your spouse?   | Yes No          | Yes No          |
| Did you earn any tips in 2022? If yes, \$_____  | Yes No          | Yes No          |
| Internet Business Activity: Do you have a webpage or websites from which you earn income?<br>If yes, provide website address: _____<br><br>Percentage of gross income generated from the website:   | Yes No<br><br>% | Yes No<br><br>% |
| Did you repay any COVID benefits in 2022? If so, please provide details.  | Yes No          | Yes No          |
| In 2022, have you spent more than 200 hours acting as a volunteer firefighter or a search and rescue volunteer?   | Yes No          | Yes No          |

### Northern Residents Travel Benefit/Medical Travel

Please include details for trips you and/or your family members took in 2022. Trips may include camping, weekend getaways, family vacations, travel for medical purposes, etc.

|        | Dates of Trip | Destination and reason for travel | Cost of total travel expenses | Cost of accommodation only | Names of family members in your household who travelled |
|--------|---------------|-----------------------------------|-------------------------------|----------------------------|---|
| Trip 1 |               |                                   | \$                            | \$                         |   |
| Trip 2 |               |                                   | \$                            | \$                         |   |
| Trip 3 |               |                                   | \$                            | \$                         |   |
| Trip 4 |               |                                   | \$                            | \$                         |   |
| Trip 5 |               |                                   | \$                            | \$                         |   |
| Trip 6 |               |                                   | \$                            | \$                         |   |
| Trip 7 |               |                                   | \$                            | \$                         |   |
| Trip 8 |               |                                   | \$                            | \$                         |   |

Check the boxes below that are applicable to you and your spouse's tax return and include any additional details.

| Income  | Primary | Spouse |
|---|---------|--------|
| T4 – Employment Income  |         |        |
| T4A – Other Income  |         |        |
| T4AP – CPP Benefits   |         |        |
| T4A OAS – Old Age Security  |         |        |
| T4E – Employment Insurance Benefits   |         |        |
| T4RSP – RRSP Income   |         |        |
| T4RIF – RRIF Income   |         |        |
| T5 – Interest and Dividend Income   |         |        |
| T3 – Estate / Trust / Mutual Funds Income   |         |        |
| T5007 – Social Assistance / WCB   |         |        |
| T5008 – Statement of Security Transactions – provide the cost when purchased  |         |        |
| T5013 – Limited Partnership Income  |         |        |
| Alimony / Spousal Support received  |         |        |
| Scholarship, Fellowship, Bursary  |         |        |
| Foreign sources   |         |        |
| Capital Gains / Losses – provide an investment statement from your advisor  |         |        |
| Bitcoin or other cryptocurrency transactions  |         |        |
| Income from sources of the sharing economy such as <i>Skip the Dishes, Airbnb, VBRO, Uber, Tappcar</i> or other online or social media activity   |         |        |
| Other slips:  |         |        |
| Deductions, Tax Credits and Expenses  | Primary | Spouse |
| RRSP contribution receipts  |         |        |
| Union, professional and like dues   |         |        |
| Child care expense  |         |        |
| Employment expenses – T2200 required  |         |        |
| Moving expenses   |         |        |
| Spousal and/or child support paid   |         |        |
| Adoption related expenses   |         |        |
| Charitable and/or political donations   |         |        |
| Tradesperson's tools acquired by employee   |         |        |
| Tools acquired by apprentice mechanics  |         |        |
| T2201 Disability Tax Credit   |         |        |
| T2202 Tuition and education   |         |        |
| T2202 Tuition transferred from dependent  |         |        |
| Interest paid on Student Loans  |         |        |
| Are you a first-time home buyer?  |         |        |
| Caregiver amount  |         |        |
| Investment counsel and management fees  |         |        |
| Eligible educator school supply tax credit: Teachers / Early Childhood Educator school supplies   |         |        |
| Interest on money borrowed to purchase investments  |         |        |
| Pension Split: Spouses may jointly elect to split certain pension income reported by the other spouse   |         |        |
| Medical expenses  |         |        |
| Premiums paid to a private health plan e.g. Alberta Blue Cross  |         |        |
| Digital News Subscription Tax Credit: If you subscribe to a Qualifying Digital News Subscription, please provide a receipt.                       |         |        |
| Canada Training Tax Credit: Provide details on tuition and your receipt if you took a course to improve your skills in an occupation.             |         |        |
| Home Accessibility Tax Credit: Home renovations for disabled person or senior citizen   |         |        |
| <b>New:</b> Labour mobility deduction for eligible tradespeople and apprentices working in the construction industry at a temporary work location |         |        |
| <b>New:</b> Purchase or upgrades to HVAC systems or purchases of stand-alone devices designed to filter air                                       |         |        |
| <b>New:</b> Costs paid for surrogate mothers and fertility treatments   |         |        |