

	Primary	Spouse
Are you a Canadian citizen?	Y N	Y N
Do you authorize CRA to give your name, address, date of birth and citizenship to Elections Canada to update the National Register of Electors?	Y N	Y N
Do you have or share custody of a child after a relationship breakdown? Does this child live with you? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, how often? <input type="checkbox"/> Full-time <input type="checkbox"/> Part-time	Y N	Y N
Has your banking information changed since your last direct deposit from CRA? If yes, please provide a VOID cheque or a Direct Deposit form from your bank.	Y N	Y N
Did you pay personal tax installments for the 2023 taxation year? If yes, \$ _____	Y N	Y N
Did you withdraw RRSP's or FHSA's to purchase a home for you or your spouse?	Y N	Y N
Did you withdraw RRSP's to finance full-time education for you or your spouse?	Y N	Y N
Did you earn tips in 2023? If yes, \$ _____	Y N	Y N
Internet Business Activity: Do you have a webpage or websites from which you earn income? If yes, provide website address: _____ Percentage of gross income generated from the website: _____ %	Y N	Y N
In 2023, did you spend more than 200 hours acting as a volunteer firefighter or a search and rescue volunteer?	Y N	Y N
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)	Y N	Y N
Did you sell bitcoin or any other cryptocurrency during the year?	Y N	Y N
Did you sell property (principal residence, rental property, vacation home, etc.) during the year? Date of sale: _____ Date of original purchase: _____ Selling price: \$ _____ Original purchase price: \$ _____	Y N	Y N
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 and/or December 31, 2023? Also, please indicate if you have more than one principal residence. You may be required to file form UHT-2900.	Y N	Y N
Whose name(s) are on title of your home?		
At any point in 2023, were you the legal owner (your name on title) of someone else's:		
a) Home or family cottage	Y N	Y N
b) Land and/or building	Y N	Y N
c) Vehicle	Y N	Y N
d) Non-registered investment account (excluding RRSP, RRIF, TFSA, FHSA, RDSP, RESP, DPSP, EPSP)	Y N	Y N
e) Bank account	Y N	Y N
f) Gold or silver coins	Y N	Y N
g) Other asset	Y N	Y N
At any point in 2023, were you the legal owner (your personal name on title) of an asset held in your corporation?	Y N	Y N
At any point in 2023, was your corporation the legal owner (on title) of your real estate, vehicle, or other asset?	Y N	Y N
Do you have access to CRA's My Account for Individuals?	Y N	Y N

Northern Residents Travel Benefit/Medical Travel

Please include details for trips you and/or your family members took in 2023. 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/T4FHSA – RRSP/FHSA 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</i> , or other online or social media activity		
Other slips:		
Deductions, Tax Credits and Expenses	Primary	Spouse
RRSP/FHSA 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		
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		
Costs paid for surrogate mothers or donors and fertility treatments		
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		
Labour mobility deduction for eligible tradespeople and apprentices working in the construction industry at a temporary work location		
New: Multigenerational home renovation tax credit		
New: Tools acquired by tradespersons and eligible apprentice mechanics - maximum deduction increased from \$500 to \$1,000		
New: Travel costs for tradespersons and apprentices engaged in construction activity at a job site at least 120 km away from ordinary place of residence		