

## **PERSONAL TAX CHECKLIST**

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

Primary Contact Information	Spouse	Information (i	fapplicabl	e)			
Name:	Name:						
Social Insurance No.:		surance No:					
Date of Birth:	Date of B	Date of Birth:					
Cell Phone:	Cell Phor	ne:					
Home Phone:	Home Ph	one:					
Email:	Email:						
How would you like to receive your tax return?	Electronically	y by email	Paper				
How do you prefer to sign your T183 and other forms?	Electronicall	y via DocuSign	🗌 Paper				
Did you move during the year?  Ves  No							
Current mailing address:							
Previous address if you moved during the year:							
Date of move:							
Province of Residence on December 31 <sup>st</sup> :							
Northern residents' deduction to claim:	f 🗌 None						
Did either of the following change during the year?							
Marital Status:							
	(If yes, provide dat	e of change)					
Last Name:	(If yes, provide nev	v last name)					
Dependent Name	Relationship	Social Insura	ance No.	Date of Birth		:h	
				Year	Month	Day	

	Pri	mary	Spo	ouse
Are you a Canadian citizen?	Y	Ν	Y	Ν
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	Ν	Υ	Ν
Do you have or share custody of a child after a relationship breakdown? Does this child live with you?  Yes No If yes, how often? Full-time Part-time	Y	Ν	Y	Ν
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.	Y	Ν	Y	Ν
Did you pay personal tax installments for the 2023 taxation year? If yes, \$	Y	Ν	Y	N
Did you withdraw RRSP's or FHSA's to purchase a home for you or your spouse?	Y	Ν	Y	Ν
Did you withdraw RRSP's to finance full-time education for you or your spouse?	Y	Ν	Y	N
Did you earn tips in 2023? If yes, \$	Y	Ν	Y	Ν
Internet Business Activity: Do you have a webpage or websites from which you earn income? If yes, provide website address:	Y	Ν	Y	Ν
Percentage of gross income generated from the website: %				
In 2023, did you spend more than 200 hours acting as a volunteer firefighter or a search and rescue volunteer?	Y	Ν	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	Ν	Y	N
Did you sell bitcoin or any other cryptocurrency during the year?	Y	Ν	Y	Ν
Did you sell property (principal residence, rental property, vacation home, etc.) during the year?	Y	N	Y	N
Date of sale: Date of original purchase:				
Selling price: \$ Original purchase price: \$				
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	Ν	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
<ul> <li>c) Vehicle</li> <li>d) Non-registered investment account (excluding RRSP, RRIF, TFSA, FHSA, RDSP, RESP, DPSP, EPSP)</li> </ul>	Y Y	N N	Y Y	N N
e) Bank account	Y	N	Y	N
f) Gold or silver coins	Y	N	Y	N
g) Other asset	Y	Ν	Y	Ν
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.

T4 – Employment Income     Image: Comparison of the start	Income	Primary	Spouse
TAA - Other income       Image: Control of the security         TAA DA - Other Benefits       Image: Control of the security         TAA DAS - Oth Age Security       Image: Control of the security         TAA - RSP/FH3A Income       Image: Control of the security         TAB - Targe/TrH3FA RSP/FH3A Income       Image: Control of the security         TS - Targer A RSP/FH3A Income       Image: Control of Security         TS - Secial Assistance / WCB       Image: Control of Security Transactions – provide the cost when purchased         TS013 - State / Tust / Mutual Funds income       Image: Control of Security Transactions – provide the cost when purchased         Scholarship, Fellowship, Bursary       Foreign sources       Image: Control of Security Transactions – provide the cost when purchased         Capital Gains / Losses – provide an investment statement from your advisor       Image: Control of Security Transactions         Income from sources of the sharing economy such as Skip the Dishes, Airbnb, VBRO, Uber, or other online or social media activity       Image: Control other security         Other slips:       Image: Control other security       Image: Control other security         Deductions, Tax Credits and Expenses       Image: Control other security       Image: Control other security         Spousal and/or child support paid       Image: Control other security       Image: Control other security         Adoptor related regenses       Image: Co			
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120 km away from ordinary place of residence			