

## Personal Tax Checklist for 2022

### THE BASICS – INFORMATION USED TO IDENTIFY YOUR TAX FILINGS

*Our address information is unchanged from our filing last year*

#### Name and Address (If changed)

Last Name	First Name	Middle Name
Date of Birth	SIN	
Home Phone	Mobile	
Email Address		
Spouse Last Name	Spouse First Name	Spouse Middle Name
Date of Birth	SIN	
Home Phone	Mobile	
Email Address		
Address Line 1		
Address Line 2		
City	Province	Postal Code

#### Marital and Other Canadian Obligations

**On December 31, 2022 your marital status was:**

Single      Common-law      Married      Divorced      Separated      Widowed

**Did your marital status change in 2022?**      Yes      No      **If yes, what was the date of change:**

**Please circle the correct answer for each of the following questions, which are required in preparing your tax return:**

	You		Spouse	
• I have read, signed and returned a copy of the 2022 personal tax engagement letter (We cannot release your return to the government without this form in our possession) .....	Yes	No	Yes	No
• I am eligible for the disability amount and have a T2201 on file .....	Yes	No	Yes	No
• I disposed of a principal residence during the year (See page 4).....	Yes	No	Yes	No
• I authorize the registration for the CRA online notification, rather than mail .....	Yes	No	Yes	No
• I am a Canadian resident on December 31, 2022 .....	Yes	No	Yes	No
• I am a US Citizen or a green card holder .....	Yes	No	Yes	No
• I am a Canadian citizen .....	Yes	No	Yes	No
• I authorize the CRA to release my name, address and date of birth to Elections Canada for the purpose of updating the National Register of Electors .....	Yes	No	Yes	No
• I have owned foreign property during 2022 with a total cost of more than Canadian \$100,000. (Refer to the engagement letter for more information and complete Appendix F if applicable).....	Yes	No	Yes	No
• I have a tax-free savings account .....	Yes	No	Yes	No

## THE BASICS – INFORMATION USED TO IDENTIFY YOUR TAX FILINGS

### Children or dependents

Last Name	First Name	Middle Name
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Date of Birth	SIN
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Email Address	Relationship
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Address, if different from above

Last Name	First Name	Middle Name
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Date of Birth	SIN
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Email Address	Relationship
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Address, if different from above

Last Name	First Name	Middle Name
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Date of Birth	SIN
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Email Address	Relationship
---------------	--------------

Address, if different from above

Last Name	First Name	Middle Name
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Date of Birth	SIN
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Email Address	Relationship
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Address, if different from above

In this section we want to learn about the slips that will be used to prepare typical data for your tax return. These first questions are asking what type of slip we should expect in the package you are delivering.

<b>TAXATION SLIPS – ITEMS TO INCLUDE IN YOUR PACKAGE</b>			
<b>T4 Slips</b>		<b>Do you have these?</b>	
		<b>You</b>	<b>Spouse</b>
<b>T4</b>	Salary, wages and benefits		
<b>T4A</b>	Pension, retirement and other income		
<b>T4A (P)</b>	Canada Pension Plan benefits		
<b>T4A (OAS)</b>	Old Age Security		
<b>T4E</b>	Employment insurance, CRB and other benefits		
<b>T4RIF</b>	Income from registered retirement income funds		
<b>T4RSP</b>	Income from registered retirement savings plans		
<b>T5 Slips</b>		<b>Do you have these?</b>	
		<b>You</b>	<b>Spouse</b>
<b>T5</b>	Statements of Investment income		
<b>T5007</b>	Statements of benefits		
<b>T5008</b>	Securities transactions		
<b>T5013</b>	Partnership income		
<b>T3 Slips</b>		<b>Do you have these?</b>	
		<b>You</b>	<b>Spouse</b>
<b>T3</b>	Trust income and distributions		
<b>Miscellaneous Government Slips</b>		<b>Do you have these?</b>	
		<b>You</b>	<b>Spouse</b>
<b>RC210</b>	Working Income Tax Benefit		
<b>T101</b>	Statement of resource benefit		
<b>T2202A</b>	Tuition and textbook amounts certificate		
<b>Other</b>	Did we forget something?		

## INCOME WITH NO SLIPS – PLEASE INCLUDE SUPPORTING DOCUMENTS

Other Income	Amount	
	You	Spouse
Gratuities and tips	\$	\$
Casual earnings	\$	\$
Spousal support	\$	\$
Bonuses not on T4 slips	\$	\$
Other: Did we forget something?	\$	\$

## CAPITAL TRANSACTIONS ON PROPERTY, INVESTMENTS AND REAL ESTATE

	You	Spouse
Did you sell any real estate property (or properties) in 2022 for which you are claiming a principal residence exemption? If so, fill out Appendix G.	Yes    No	Yes    No
Did you have any realized capital gains or losses, other than a principal residence, during 2022?	Yes    No	Yes    No

**(If yes to either of the above, we require the following information)**

Type of Investment	Please provide the following:
Investments held in a brokerage account (non-registered accounts)	<ul style="list-style-type: none"> <li>Realized capital gain/loss report</li> <li>Summary statement of all stock-transactions, including the Average Cost Base (ACB) for each stock sold</li> </ul>
Investments not held in a brokerage account (nonregistered accounts)	<ul style="list-style-type: none"> <li>Summary of all sales, including the original purchase price and the proceeds on sale</li> </ul>
Real estate	<ul style="list-style-type: none"> <li>Purchase and sale agreements, statement of adjustments, and other pertinent information</li> </ul>
Other investments	<ul style="list-style-type: none"> <li>Purchase and sale agreements, statement of adjustments, and other pertinent information</li> </ul>

### Investment Advisor

First Name	Last Name
Institution or Firm Name	
Phone Number	
Email	
Does the firm have permission to email your advisor for any missing investment statements needed for your 2022 tax return?	
	Yes    No

## DEDUCTIONS FROM INCOME – See Appendices

I (We) have Rental Properties and have completed Appendix A	Yes	No
I am (We are) Self-Employed and have completed Appendix B	Yes	No
I am (We are) claiming Home Office Expense and have completed Appendix C	Yes	No
I am (We are) claiming Automobile Expenses and have completed Appendix D	Yes	No
I am (We are) claiming Employment Expenses and have completed Appendix E	Yes	No
I (We) have Foreign Investments and have completed Appendix F	Yes	No
I (We) have disposed of a Principal Residence and have completed Appendix G	Yes	No

## ADDITIONAL INFORMATION

Description – Attach Receipts and Details	Amount	
	You	Spouse
COVID-19 work from home flat rate method (\$2/day, max of \$500)	\$	\$
Installment payments made to Canada Revenue Agency	\$	\$
RRSP contributions or lump sum transfers	\$	\$
Medical receipts	\$	\$
Donation receipts and political contributions	\$	\$
Child care expenses	\$	\$
Adoption expenses	\$	\$
Canadian caregiver credits	\$	\$
First-time home buyer (please include purchase price and date)	\$	\$
Union, professional, or like dues	\$	\$
Interest on student loans	\$	\$
Moving expenses, if at least 40 kilometres closer to work or school	\$	\$
Interest paid on loans for investment purposes	\$	\$
Investment management fees paid	\$	\$
Other investment related expenses	\$	\$
ON teacher supplies expenses	\$	\$
Senior home renovation credit	\$	\$
Tradesperson tools deduction	\$	\$
Volunteer firefighters amount	\$	\$
ON training tax credit	\$	\$
Ontario Staycation Tax credit	\$	\$
Digital news subscription	\$	\$
Other – Did we forget something?	\$	\$