

2023 PERSONAL TAX CHECKLIST

NAME _____	SIN _____			
ADDRESS _____	DATE OF BIRTH _____			
_____	MARITAL STATUS _____			
PHONE _____	EMAIL _____			
NAME OF SPOUSE _____	SPOUSE'S NET INCOME _____			
OWN FOREIGN PROPERTY WITH A COST MORE THAN \$100,000	YES NO	CANADIAN CITIZEN	YES	NO
PROVIDE NAME/ADDRESS/DATE OF BIRTH TO ELECTIONS CANADA	YES NO	US CITIZEN	YES	NO

INFORMATION SLIPS			TAX SCHEDULES TO BE COMPLETED		
T3 _____	T4E _____		T2125 - SELF-EMPLOYMENT	GST RETURN	YES NO
T4 _____	T4RSP _____		T776 - RENTAL		YES NO
			T2042 - FARM	GST RETURN	YES NO
T4A _____	T4RIF _____		TL2 - MEALS AND LODGING EXPENSES		YES NO
T4AP/OAS _____	T5 _____		T1M - MOVING EXPENSES		YES NO
T5013 _____	T5007/T5008 _____		LOGGING TAX RETURN		YES NO

TAX ISSUES TO CONSIDER					
CHANGE IN MARITAL STATUS	YES	NO	RRSP CONTRIBUTIONS	YES	NO
CHILD SUPPORT/SPOUSAL PAYMENTS	YES	NO	UNION/PROFESSIONAL DUES	YES	NO
PENSION SPLITTING	YES	NO	CHARITABLE DONATIONS	YES	NO
CHANGE IN HEALTH STATUS	YES	NO	POLITICAL DONATIONS	YES	NO
MEDICAL EXPENSES/EXT HEALTH PREMIUMS	YES	NO	HOME BUYER PLAN REPAYMENT	YES	NO
MEDICAL TRAVEL	YES	NO	PURCHASE OR SALE OF PRINCIPAL RESIDENCE	YES	NO
CLAIM/TSFR DISABILITY TAX CREDIT	YES	NO	CHANGE IN USE OF PERSONAL HOME/RENTAL	YES	NO
CAREGIVER TAX CREDIT	YES	NO	HOME RENO COSTS (SENIOR/DISABLED)	YES	NO
STUDENT LOAN INTEREST	YES	NO	EMPLOYMENT EXPENSES (WORK FROM HOME)	YES	NO
TUITION PAID/TRANSFER	YES	NO	WORKING AS A TRADESMAN / APPRENTICE	YES	NO
CHILD CARE EXPENSES	YES	NO	FOREIGN PENSION INCOME	YES	NO
NEW CHILDREN	YES	NO	SALE OF CAPITAL PROPERTY	YES	NO
ADOPTION EXPENSES	YES	NO	INVESTMENT COSTS (INTEREST/FEEES)	YES	NO
TEACHER EDUCATION EXPENSES	YES	NO	VOLUNTEER FIREFIGHTER/SEARCH & RESCUE	YES	NO
NORTHERN RESIDENTS DEDUCTION	YES	NO	ELECTRONIC NEWS SUBSCRIPTION	YES	NO

PROPERTY HELD IN TRUST (NEW):

ARE YOU HOLDING PROPERTY 'IN TRUST' FOR THE BENEFICIAL OWNER? YES NO

NOTES
