



## Welcome to our office!

Please take the time to fill in this form so we know that we have received all the necessary information to complete your income tax return(s)

**2023**

	You			Spouse		
Last Name						
First Name						
Previous last name? (If changed since your last tax return)						
Birthdate						
SIN						
Cell**						
Home phone (if different from Cell)**						
Email (For our office use)						
Tax returns Included	2020	2021	2022	2020	2021	2022
Copy of 2022 Notice of Assessment	Included	Can't find		Included	Can't find	

\*\*CRA requires a phone number on the tax return. Please check which phone we should provide for each individual for tax correspondence.

### Mailing Address

(Indicate if there are different addresses for each person above)

	You		Spouse	
Are you a Canadian citizen?	YES	NO	YES	NO
If no, are you a permanent resident (for immigration purposes)?	YES	NO	YES	NO
If no, is your name on any land title of Canadian residential property?	YES	NO	YES	NO
Did you spend more than 122 days in the US in 2023?	YES	NO	YES	NO
If yes, have you filed your Form 8840 with the IRS?	YES	NO	YES	NO
Are you a US Citizen, Green Card Holder or considered to be a US person?	YES	NO	YES	NO

Please state your province of residence at December 31, 2023:

What was your marital status on December 31, 2023?

Married      Separated      Living common-law\*  
 Divorced      Single\*      Widowed

Was there a change in your marital status during the year or since December 31, 2023?      YES      NO

If yes, what was the change and on what date?

\* Living common-law means you have lived with someone in a conjugal relationship for 12 consecutive months or you live together and have a child in common living in your home. If you require a definition of "conjugal", please ask for the detailed definition.

Dependant persons who live with you:

		Dependant 1			Dependant 2		
Name							
SIN							
Birthdate (mm/dd/yy)							
Citizenship							
Relationship to you							
Qualify for disability tax credit?		YES	NO		YES	NO	
Copy of 2022 notice of assessment	Did not file	Included	Can't find		Included	Can't find	
	Tax return included	2020	2021	2022	2020	2021	2022
		Dependant 3			Dependant 4		
Name							
SIN							
Birthdate (mm/dd/yy)							
Citizenship							
Relationship to you							
Qualify for disability tax credit?		YES	NO		YES	NO	
Copy of 2022 notice of assessment	Did not file	Included	Can't find		Included	Can't find	
	Tax return included	2020	2021	2022	2020	2021	2022

*If additional people live with you, please attach a separate sheet containing all of the above information*

Are any of these individuals living with you but not having their tax return prepared here? YES NO  
**If yes**, provide a copy of their 2023 tax return.

Where did you hear about us? If you were referred here, then by whom?

Have you had direct deposit of your tax return in prior tax years?*	YES	NO
<i>If your banking information has changed and you have not updated it with the Canada Revenue Agency, please ask us how to do this.</i>		
<b>If no</b> , would you like to start Direct Deposit?	YES	NO
<b>If yes</b> , If you have MyAccount with CRA, you can set up your Direct Deposit online. You may also call 1-800-959-8281 to set up. If you want to set this up for the Climate Action Incentive benefits and for next tax season, please request a direct deposit form to fill in and provide a voided cheque.		
<i>*Note: your direct deposit continues with the Canada Revenue Agency until <b>you</b> cancel it.</i>		

A PDF copy of your tax return will be created and will be available as a download from our secure web portal. A printed copy will also be provided to you unless you prefer to be paperless. If you **DO NOT want a paper copy** of your return, check here

**PLEASE READ EACH QUESTION CAREFULLY**

<b>1. FOREIGN PROPERTY/INCOME</b>		
Did you answer "yes" to any of the Foreign Property questions? <i>If yes, please provide details.</i>	YES	NO
Did you receive income from any foreign sources? <i>If yes, please provide details.</i>	YES	NO

<b>2. CHILDREN</b>		
Do you have dependant children? <i>If no, please proceed to section 3</i>	YES	NO
Are you married to or living common-law with the other parent of your child(ren)? <i>If no, would you like information about the possibility of splitting the Canada Child Benefit?</i>	YES	NO
Did you adopt a child in 2023? <i>If yes, provide details of all adoption expenses.</i>	YES	NO
Did you incur childcare expenses? (i.e. daycare, in person camps 5-day min, playschool) <i>If yes, provide receipts.</i>	YES	NO
Do you have children attending post-secondary schooling? <i>If yes, are they transferring their tuition and education amounts to you?</i>	YES	NO
<b>If your child is transferring their tuition to you, please provide a T2202A signed by the child and a copy of their 2023 tax return if we are not preparing it.</b>	YES	NO

<b>3. DIVORCED OR SEPARATED</b>		
Have you ever been divorced or separated? <i>If no, please proceed to section 4</i>	YES	NO
Do you pay or receive spousal support or child maintenance? <i>If yes, please provide a signed copy of the court order and details of amounts paid and received.</i>	YES	NO
Did you incur legal costs during the year to collect late support payments, establish the amount of support payments you would receive, increase the support payments you receive or to vary an existing child support agreement where you are the recipient? <i>If yes, provide receipts.</i>	YES	NO

<b>4. SENIORS AND/OR RETIRED</b>		
Are you or your spouse a senior and / or retired? <i>If no, please proceed to section 5</i>	YES	NO

Do you or your spouse receive CPP?	YES	NO	
If yes, are you or your spouse still receiving a T4 for employment income?	YES	NO	
If yes, have you filled in a CPT30 to elect to stop paying CPP? If yes, provide a copy of the CPT30	YES	NO	
Do you or your spouse receive a private pension or RIF withdrawals?	YES	NO	
If yes, would you like to minimize income taxes by splitting the taxable pension amounts?	YES	NO	
Do you receive pension from a foreign country?	YES	NO	
If yes: AMOUNT: (CAD \$) COUNTRY: Provide documentation, if available.			
If you receive US Social Security, have you been receiving it since before January 1, 1996?	N/A	YES	NO

#### 5. MOVING OR RENOVATING

Did you move or renovate in 2023? <i>If no, please proceed to section 6</i>	YES	NO
Did you incur moving expenses? If yes, please fill out the <b>Moving Expenses checklist</b> .	YES	NO
Did you move into a newly built home or did you renovate at least 90% of your home in 2022 or 2023? (to qualify, you must have moved interior walls)	YES	NO
If yes, <u>and the fair market value is less than \$450,000</u> , have you claimed the GST credit yet?	YES	NO
Did you become the owner of a home in 2023?	YES	NO
If yes, had you or your spouse owned another home within the last 5 years?	YES	NO
Is anyone living in your household age 65 or older OR entitled to the disability tax credit? A. If yes, did you pay for renovations to enable that person to gain access, enhance mobility, or reduce the risk of harm of living in your home? Provide all receipts.	YES	NO
B. If yes, did you pay to renovate or build a secondary suite in your home or on your property? Please provide all receipts for costs paid up to \$50,000 for the completed project.	YES	NO
<b>NOTE: It is possible to select Yes to both A &amp; B above.</b>		

#### 6. REAL ESTATE

If you answer yes, to any of the below real estate questions, please fill in a <b>Real Estate Checklist</b> (section indicated below):		
Did you sell or have your name removed off title of any real estate in 2023? (This may include land, home, assignment, vacation property, business, farm, investment, or rental property - inside or outside Canada) (Section 1 or 4)	YES	NO
Did you change all or some of your personal residence to a rental property in 2023? (Section 2)	YES	NO
Did you convert a rental property that you own to your personal residence in 2023? (Section 3)	YES	NO

## 7. SAVINGS OR INVESTMENTS

Do you or your spouse have savings accounts, registered accounts, or investments? <i>If no, please proceed to section 8.</i>	YES	NO
Did you make RRSP contributions from March 2 to December 31, 2023?	YES	NO
Did you make RRSP contributions from January 1 to February 29, 2024?	YES	NO
Have you participated in the Home Buyers Plan or Lifelong Learning Plan?	YES	NO
Did you make FHSA (First Home savings account) contributions in 2023? <i>If yes, provide your T4FHSA receipt.</i>	YES	NO
Do you have a Tax-Free Savings Account (TFSA)? <i>If yes, did you receive a penalty letter from the Canada Revenue Agency claiming that you had over contributed? (If yes, provide a copy of letter.)</i>	YES	NO
Did you pay interest on money borrowed to invest?	YES	NO
Do you have other investments outside your registered accounts? <i>If yes, provide details of your other investments (real estate, oil and gas, labour sponsored funds).</i>	YES	NO
Did you pay fees for investment advice outside your registered accounts? <i>If yes, please provide details.</i>	YES	NO
Did you sell any investments outside registered accounts? (i.e. Stocks, bonds, mutual funds, ETFs) <i>If yes, please provide details on the sale (sale amount, original cost, elected amount from 1994) and/or a gain/loss report for sales of stocks, bonds, mutual funds, ETFs, etc.</i>	YES	NO
Do you or your spouse have unrealized losses in your individual investment portfolio? <i>If yes, did the spouse who did <b>not</b> have the unrealized losses incur tax on capital gains in the last three years?</i>	YES	NO
Did you convert any investments (outside of your registered accounts) from one name to another? (i.e. Did you exchange mutual fund or ETF A for B or Trust Fund A to Corporation A)?	YES	NO
Did you have a loss on any investments and then buy them back within 30 days or transfer them to another account that you or your spouse own? <i>If yes, please provide detailed documentation.</i>	YES	NO

## 8. STUDENTS

Was anyone included on this checklist a student in 2023 or have tuition credits carrying forward? <i>If no, please proceed to section 9</i>	YES	NO
Did you attend post-secondary school? <i>If yes, provide the T2202A.</i>	YES	NO
Did your employer pay the tuition fees?	YES	NO
Were you enrolled full time in a post-secondary institute?	YES	NO
Were you enrolled part time in a post-secondary institute?	YES	NO
Did you pay additional fees for exams or other mandatory fees in anticipation of earning a professional status or trade?	YES	NO
<i>If yes, are these fees included on your T2202A? If no, provide receipts.</i>	YES	NO

Did you pay fees for an occupational skills course? <b>If yes</b> , provide the T2202A or letter of certification from the educational institution. (If you paid through your business, make sure not to double claim.)	YES	NO
Do you have tuition amounts carrying forward <b>and</b> have changed your province of residence since attending school?	YES	NO
Did you move to go to post-secondary school and have taxable income? <b>If yes</b> , please fill out the <b>Moving Expenses</b> checklist.	YES	NO

**9. OTHER DEDUCTIONS**

Are you paying off Canadian or provincial government sponsored student loans? <b>If yes</b> , provide details of interest paid.	YES	NO										
Did you pay a fee to prepare your 2022 tax return? <b>If yes</b> , please provide the receipt	YES	NO										
Did you pay professional dues or union dues? (If not included on your T4, please provide receipts)	YES	NO										
Did you make charitable donations? <b>If yes</b> , provide receipts. If scanning documents, please send them one per page.	YES	NO										
Did you make political contributions? <b>If yes</b> , provide receipts.	YES	NO										
Did you pay for medical expenses? <b>If yes</b> , provide all receipts including for dependants living with you. (Please EXCLUDE any cosmetic procedures or ask us about this) Please check off all medical that applies (this list is not exhaustive):	YES	NO										
<table border="0"> <tr> <td>Private health plan premiums</td> <td>Dental</td> </tr> <tr> <td>Out of country/province medical insurance premiums</td> <td>Chiropractor</td> </tr> <tr> <td>Prescriptions (summary from pharmacy is preferred)</td> <td>Nursing care, attendant care, seniors' home</td> </tr> <tr> <td>Optometry / eyeglasses / contacts</td> <td>Fertility treatments or surrogacy</td> </tr> <tr> <td>Other:</td> <td></td> </tr> </table>	Private health plan premiums	Dental	Out of country/province medical insurance premiums	Chiropractor	Prescriptions (summary from pharmacy is preferred)	Nursing care, attendant care, seniors' home	Optometry / eyeglasses / contacts	Fertility treatments or surrogacy	Other:			
Private health plan premiums	Dental											
Out of country/province medical insurance premiums	Chiropractor											
Prescriptions (summary from pharmacy is preferred)	Nursing care, attendant care, seniors' home											
Optometry / eyeglasses / contacts	Fertility treatments or surrogacy											
Other:												
Were you required to travel for a medical service not available within 40 km of your home? <b>If yes</b> , please fill in the <b>Medical Trip List</b> or provide your own list with the same details (including if a driver was needed).	YES	NO										
Are you or someone in your immediate family disabled? <b>If yes</b> , is this an ongoing claim?	YES	NO										
<b>If this is your first claim</b> , provide a copy of the completed <b>T2201</b> or letter of approval from CRA.												
Do you or does someone on this checklist have any of the following medical conditions? (Some illnesses may provide additional deductions on your income tax return.)	YES	NO										
<table border="0"> <tr> <td>Celiac disease</td> <td>Type 1 Diabetes</td> <td>Other (please specify):</td> </tr> <tr> <td>Cancer</td> <td>Epilepsy</td> <td></td> </tr> </table>	Celiac disease	Type 1 Diabetes	Other (please specify):	Cancer	Epilepsy							
Celiac disease	Type 1 Diabetes	Other (please specify):										
Cancer	Epilepsy											
Who has the condition and how long have they had it? Name: How Long:												
Are you the caregiver for any infirm family member? <b>If yes</b> , list the family member and their infirmity:	YES	NO										

Did you pay for a subscription to any Canadian digital news outlet? <i>If yes, provide a receipt with the Qualified Canadian Journalism Organization number on it.</i>	YES	NO
Did you live in a prescribed Northern zone for at least 6 consecutive months in 2023? <i>If yes, please provide details:</i> Dates: Physical Address: Number of persons living with you and their relationship to you: Provide receipts for eligible travel (medical and up to two vacations) in 2023	YES	NO
Did you prepay tax installments directly to CRA for your 2023 tax return? <i>If yes, provide proof of payment.</i>	YES	NO
Are you an emergency volunteer who received an honorarium for your volunteer work?	YES	NO
Are you a member of a volunteer fire department where you participated in at least 200 hours of service during the year?	YES	NO
Are you a Search and Rescue member who volunteered at least 200 hours of service during the year?	YES	NO
Are you a member of the clergy? <i>If yes, provide a T1223</i>	YES	NO

<b>10. INCOME / SELF EMPLOYMENT</b>		
Do you have any information slips? Please provide all you have. If providing scanned T-slips, please send them one per page <u>without security</u> and named with what kind of slip it is. (i.e., T3, T4, T5, T4A, T4A(OAS), T4A(P), T4E, T4RIF, T4FHSA, T5018, etc.) <i>Remember, T-slips may not arrive in the mail and you must retrieve the electronic version</i>	YES	NO
Did you invest in, purchase, mine, sell or use to purchase something else using crypto, virtual, or digital currencies (i.e. Bitcoins) in 2023? <i>If yes, please provide details.</i>	YES	NO
Did you repay any COVID benefits in 2023? <i>If yes, provide details of repayment and of the year the benefit was received.</i>	YES	NO
Do you have any other income earned or benefits received that is not reported on a T-slip? (i.e. Contract work, honorariums, directors fees, crowd-funding). Please specify:	YES	NO
Have you received any incentive rebate payments related to your work that has not been reported on a T-slip or your business income? <i>If yes, please provide details.</i>	YES	NO
Did you receive interest, dividends, capital gains, partnership income, trust income or benefits from a business in which a relative is a key person (in terms of ownership or involvement)? <i>If yes, provide details of income and relationship involved:</i> Income: Relationship involved:	YES	NO

Do you have an unincorporated business other than farming? <i>If yes, please fill in the <b>Business Checklist</b>.</i>	YES	NO
Do you receive income from internet sales of goods or services or influencing of \$1,000 per month or more? <i>If yes, please fill in a Business Checklist.</i>	YES	NO
Do you have an unincorporated farm or own farmland? <i>If yes, please fill in the <b>Farm Checklist</b>.</i>	YES	NO
Do you own rental property? <i>If yes, please fill in one <b>Rental Checklist</b> for each property.</i>	YES	NO
Have you received money or any other commodity as a result of listing personal assets for use by others besides family or friends (the sharing economy such as AirBnB, VRBO, Uber)? <i>If yes, please fill in the appropriate <b>Business</b> or <b>Rental Checklist</b>.</i>	YES	NO
Did you operate a business and pay interest on personal loans?	YES	NO
If you are self-employed, have you opted into the EI program for special benefits? (such as maternity or compassionate care)	YES	NO

<b>11. EMPLOYMENT EXPENSES (&amp; APPRENTICES)</b>		
Was anyone on this checklist an employee at any time in 2023? <i>If no, please proceed to section 12</i>	YES	NO
Were you required to pay employment expenses? <i>If yes, and you want to claim expenses, fill in the <b>Employee Expense Checklist</b>.</i>	YES	NO
Does anyone covered on this checklist work in the hospitality industry (i.e., restaurant, casino, hotel, tourism, spa, salon)? <i>If yes, please fill in the <b>Tips Declaration Form</b>.</i>	YES	NO
Are you an employed teacher or early childhood educator who paid for consumable supplies, durable goods or technological devices used for work that you were not reimbursed for? <i>If yes, provide the required certification from your employer and copies of your receipts.</i>	YES	NO
Are you an apprentice? <i>If yes, have you applied for and received the grants you are entitled to?</i>	YES	NO
Were you an apprentice mechanic or tradesperson and spent more than \$1,368 on <u>new</u> tools in 2023? <i>If yes, provide a list with date, description and amount spent signed by employer, receipts and a signed T2200.</i>	YES	NO
Are you an employee in the transport industry and have expenses to claim? <i>If yes, fill in the <b>Transport Employee Checklist</b>.</i>	YES	NO
Are you an employee in the construction industry who is a qualified tradesperson or apprentice:	YES	NO
A. and travelled for work to a job site located at least 120 km one way from home?	YES	NO
B. and temporarily relocated more than 150 km closer to the work site where you worked for at least 36 hours?	YES	NO
<i>If yes to A. or B., did you pay for expenses that were not reimbursed or covered by subsistence payments?</i>	YES	NO
<i>If yes to A. or B., provide receipts for expenses and an auto log for travel.</i>		



**12. OTHER INFORMATION**

Do you, or did you, at any point in 2023 have any assets that have any other name listed on title besides your own?	YES	NO
<b>If yes, Please fill in the Bare Trust Checklist.</b>		
Do you have a will?	YES	NO
Would you like information about Home Buyer programs related to purchasing your first home or after a marital status change?	YES	NO
Would you like information about RESPs for your children or grandchildren?	YES	NO
Would you like information about grants and bonds available from the federal government for people under 60 with a disability?	YES	NO
We are working with Collin Noble from CORE Wealth Solutions to assist our clients in achieving their financial goals. Would you like additional information about this service?	YES	NO

**13. NEXT YEAR TAXES**

Would you like us to send a 2024 personal tax package without you first contacting our office?

**If yes,** indicate your preferred delivery method:

Portal

Canada Post

Phone for pick-up

If there is anything else you want to tell us, please include it here: