



Individual Tax Return Checklist

If you are a new client referred by one of our previous clients, enter their **promotion code** to save 5 % on your personal tax return fees: _____

Section A (Personal Information):

First Name: _____ Last Name: _____

SIN Number: _____

Date of Birth: _____ (YYYY-MM-DD)

Current Home Address: Unit/Apt _____ Street Address _____

City _____ Province _____ Postal code: _____

Is your mail address the same as your current home address? YES NO

Mail Address (If different from home address): _____

Telephone: _____

If this return is for a deceased person, please enter the date of the death? _____ (YYYY-MM-DD)

Preferred language: English French

Marital Status: Married Living Common-law Widowed

Divorced Separated Single

Did you and your spouse live together for all of 2022? YES NO

How many children you have? _____ (If you have children, please fill Section C)

In which province or territory did you live on December 31, 2022? _____

Did you come to Canada in 2022? YES NO

If yes, please enter the date of entry? _____ (YYYY-MM-DD)

Enter your total income from January 1, 2022 until the date you came to Canada? \$ _____

What was your status in Canada in 31 December 2022?

Study Permit Work Permit Tourist Permanent Resident Citizen

Were you confined to a prison for a period of 90 days or more in 2022? YES NO





How much did you pay for a rental home or property tax for owned home in 2022? (Please do not enter monthly amount, write the total amount you paid in 2022 for each address)

Home	Address and postal code (Unit/Apt, Street Address, City, Province, Postal Code)	Number of months in 2022	Total amount paid for rent	Total amount paid for property tax (if you own a home)
Home 1				
Home 2				
Home 3				

Did you own specified foreign property with a total cost of more than \$100,000 in 2022 (answer for properties that are not for your personal use)? YES NO

If yes, how much does it worth in Canadian dollars: \$ _____

If it is equal or more than 250,000, what kind of property it is? _____

Are you filing an income tax return with the CRA for the first time? YES NO

If no please sign in to your CRA my account and add me as an authorized representative.

[Authorize a Representative Guide](#)

How do you want to receive your notices of assessment? Paper Email

If you want to register to receive email notification from the CRA and can view and access your notices of assessment online, please write your email address: _____

Do you agree that it is your responsibility to properly report your income, allowable credits and deductions?

Business Solutions co YES NO





Section B (Income Information):

#	Question	Check if YES	Required Document
1	Did you receive employment income?	<input type="checkbox"/> YES <input type="checkbox"/> NO	T4
2	Did you have other income (other than employment income)?	<input type="checkbox"/> YES <input type="checkbox"/> NO	The amount
3	Did you have self-employment income?	<input type="checkbox"/> YES <input type="checkbox"/> NO	Please download and fill the self-employed form
4	Did you earned rental income?	<input type="checkbox"/> YES <input type="checkbox"/> NO	Please fill Section F
5	Did you receive CERB/CRB?	<input type="checkbox"/> YES <input type="checkbox"/> NO	T4A
6	Did you receive EI?	<input type="checkbox"/> YES <input type="checkbox"/> NO	T4E
7	Did you receive a scholarship?	<input type="checkbox"/> YES <input type="checkbox"/> NO	T4A
8	Did you pay tuition for a semester in 2022?	<input type="checkbox"/> YES <input type="checkbox"/> NO	T2202
9	Do you have unused tuition from previous years?	<input type="checkbox"/> YES <input type="checkbox"/> NO	Authorize a Representative Guide
10	Did you have investment income? (E.g. Dividends or Interests)	<input type="checkbox"/> YES <input type="checkbox"/> NO	T5
11	Did you receive income from investment in mutual funds in non-registered accounts?	<input type="checkbox"/> YES <input type="checkbox"/> NO	T3
12	Did you have any medical expenses? Or Did you pay an insurance premium to university or an insurance company?	<input type="checkbox"/> YES <input type="checkbox"/> NO	Receipt
13	Did you have donations?	<input type="checkbox"/> YES <input type="checkbox"/> NO	Receipt
14	Do you, your spouse or your dependents have a disability?	<input type="checkbox"/> YES <input type="checkbox"/> NO	Related documents
15	Did you dispose of your principal residence in 2022? (E.g. Having sold a home)	<input type="checkbox"/> YES <input type="checkbox"/> NO	Related documents
16	Did you buy a home for the first time in 2022?	<input type="checkbox"/> YES <input type="checkbox"/> NO	Related documents
17	Do you have any dependents (Other than your spouse and children)?	<input type="checkbox"/> YES <input type="checkbox"/> NO	Related documents
18	Did you move to another city to find a job or begin full time attendance at an educational institution?	<input type="checkbox"/> YES <input type="checkbox"/> NO	Please fill Section E
19	Did you contribute in RRSP/PRPP?	<input type="checkbox"/> YES <input type="checkbox"/> NO	Contribution documents from March 2, 2022 to March 1, 2023
20	Are you an elementary or secondary school teacher or early childhood educator?	<input type="checkbox"/> YES <input type="checkbox"/> NO	Documents for your expense
21	Did you have foreign income? (e.g. if you worked in the US or other countries)	<input type="checkbox"/> YES <input type="checkbox"/> NO	Tax return filed in that country
22	Do you want CRA deposit your refunds, benefits and/or credits directly into your bank account?	<input type="checkbox"/> YES <input type="checkbox"/> NO	Void Check or Bank account information
23	Did you work from home because of COVID19?	<input type="checkbox"/> YES <input type="checkbox"/> NO	T2200 and fill Section D



Section C (Dependents' Information):

Children Information	Child 1	Child 2	Child 3
First name			
Last name			
Sex			
Date of Birth			
Social Insurance Number			
Income			
Tuition			

**If you have more than three dependant, please use an additional sheet.

Section D (Work from home Information):

Do you have all of the receipts for your work from home expenses: Yes No

Do you have T2200 from your employer for your work from home expenses: Yes No

If you answered Yes to both above questions fill part B, otherwise fill part A.

Part A:

How many days did you work from home due to Covid-19 in 2022? (maximum of 250 days) _____

Part B: (Fill this part only if you have receipt for your expenses)

What type of space do you work from at home?

Designated work space (room) Common (shared) space

Your work space area _____ m2, Your total home area _____ m2

How many hours a week have you worked from home? _____

Your work home period : Start: _____ (YYYY-MM-DD) End: _____ (YYYY-MM-DD)

For below expenses write the total amount you paid during your working from home period in 2022.

Rent: \$ _____ Electricity: \$ _____ Heat: \$ _____ Water: \$ _____ Internet : \$ _____

Maintenance for (office room): _____ Maintenance (for home): _____ Office Supplies: \$ _____





Section E (Moving Expenses):

The main reason for the move To work or to run a business To study full time

New company name and address:

Distance in kilometers between your old home and your new place of work or educational institution _____

Distance in kilometers between your new home and your new place of work or educational institution _____

The address of your old home _____

The address of your new home _____

Date of move _____

The date you started your new job or business or your study _____

Method of travel Personal car U-Haul

How much you paid for moving \$ _____

How much you paid for temporary accommodation? \$ _____

How much you paid for the meal? \$ _____

Number of household members in move _____

Cost of selling old residence \$ _____

The cost of purchasing new residence \$ _____

Section F (Rental Income):

The address of your rental properties: _____

Postal code: _____

Total rental income in 2022: _____

Expenses:

Advertising: _____ Insurance: _____

Interest and Bank charges: _____ Repairs and maintenance: _____

Management and administration fees _____ Professional fees (including legal and
accounting fee) _____ Property tax: _____ Travel: _____ Utilities: _____

Other expenses: _____

If you have co-owners please write their full name, percentage of ownership and share of rental income or loss?

