



## 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):

**\*\*\* For section A and B, if you provided this information in 2022 and it has not changed since then you can enter a hyphen (-) and skip that question. Like for your First name, Last name, SIN, Home address, Email address, Telephone, Marital status, your Status in Canada or your children information.**

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

SIN Number: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ (YYYY-MM-DD)

Current Home Address: Unit/Apt \_\_\_\_\_ Street Address \_\_\_\_\_

City \_\_\_\_\_ Province \_\_\_\_\_ Postal code: \_\_\_\_\_

If you want CRA letters to be mailed to another address other than your home address please write your mailing address here? \_\_\_\_\_

Email address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Preferred language:  English  French

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

Marital Status:  Married  Living Common-law  Widowed

Divorced  Separated  Single

Did you become a tax resident in Canada in 2023?  YES  NO

If yes, please enter the date you received your work permit/study permit? \_\_\_\_\_ (YYYY-MM-DD)  
(If you entered as a permanent resident please enter the date you entered Canada)

Enter your world income from January 1, 2023 until the date you entered above? \$ \_\_\_\_\_

What was your status in Canada in 31 December 2023?

Study Permit  Work Permit  Tourist  Permanent Resident  Citizen

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





**Section B (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.

**\*\*\* From here it is related to 2023 and should be filled anyway**

**Section C (2023 Information):**

In which province or territory did you live on December 31, 2023? \_\_\_\_\_

Were you confined to a prison for a period of 90 days or more in 2023?  YES  NO

Did you own specified foreign property with a total cost of more than \$100,000 in 2023 (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? \_\_\_\_\_

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

Business Solutions co  YES  NO

How much did you pay for a rental home or property tax for owned home in 2023? (Please do not enter monthly amount, write the total amount you paid in 2023 for each address)

Home	Address and postal code (Unit/Apt - Street Address, City, Province, Postal Code)	Number of months in 2023	Total amount paid for rent	Total amount paid for property tax (if you own a home)
Home 1				
Home 2				
Home 3				





## Section D (Income Information):

#	Question	Check if YES or NO	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	Please explain in the empty box provided at the end of checklist
3	Did you have self-employment income? (e.g. Uber)	<input type="checkbox"/> YES <input type="checkbox"/> NO	<a href="#">Please download and fill the self-employed form</a>
4	Did you earned rental income?	<input type="checkbox"/> YES <input type="checkbox"/> NO	Please fill Section E
5	Did you pay for Childcare?	<input type="checkbox"/> YES <input type="checkbox"/> NO	Related documents
6	Did you receive EI income?	<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 2023?	<input type="checkbox"/> YES <input type="checkbox"/> NO	T2202
9	Did you have investment income? (E.g. Dividends, Interests, income from investment in mutual funds )	<input type="checkbox"/> YES <input type="checkbox"/> NO	T3 / T5
10	Did you have any medical expenses not covered by your insurance?	<input type="checkbox"/> YES <input type="checkbox"/> NO	Receipt
11	Did you pay an insurance premium to university or an insurance company?	<input type="checkbox"/> YES <input type="checkbox"/> NO	Plan name and the amount you paid
12	Did you have donations?	<input type="checkbox"/> YES <input type="checkbox"/> NO	Receipt
13	Do you, your spouse or your dependents have a disability?	<input type="checkbox"/> YES <input type="checkbox"/> NO	Related documents
14	Did you buy a home for the first time in 2023?	<input type="checkbox"/> YES <input type="checkbox"/> NO	Related documents
15	Did you dispose of your principal residence in 2023? (E.g. Having sold a home)	<input type="checkbox"/> YES <input type="checkbox"/> NO	Related documents
16	Do you have any dependents (Other than your spouse and children)?	<input type="checkbox"/> YES <input type="checkbox"/> NO	Related documents
17	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 G
18	Did you contribute in RRSP/PRPP/FHSA investment plans? For RRSP there are two forms, one from March 2, 2023 to Dec 31, 2023. The other one from Jan 1, 2024 to Feb 29, 2024.	<input type="checkbox"/> YES <input type="checkbox"/> NO	Contribution documents
19	Are you an elementary or secondary school teacher or early childhood educator?	<input type="checkbox"/> YES <input type="checkbox"/> NO	Documents for your expense
20	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
21	Did you work from home?	<input type="checkbox"/> YES <input type="checkbox"/> NO	T2200 and fill Section F
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





### Section E (Rental Income):

The address of your rental properties: \_\_\_\_\_

Postal code: \_\_\_\_\_

Total rental income in 2023: \_\_\_\_\_

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?

### Section F (Work from home Information):

You should ask your employer if they are providing T2200 for you. If yes, you can claim work from home 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? \_\_\_\_\_

For below expenses write the **total amount you paid during your working from home period in 2023.**

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

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





### Section G (Moving Expenses):

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

New company name: \_\_\_\_\_

New company address: \_\_\_\_\_

The address of your old home: \_\_\_\_\_

The address of your new home: \_\_\_\_\_

Date of move (YYYY-MM-DD) \_\_\_\_\_

The date you started your new job or business or your study(YYYY-MM-DD) \_\_\_\_\_

Method of travel  Personal car  U-Haul

Number of household members in move \_\_\_\_\_

How much you paid for transportation and storage? \$ \_\_\_\_\_

How many nights you had temporary accommodation during your travel (on the way)? \_\_\_\_\_

How much you paid for temporary accommodation during travel (on the way)? \$ \_\_\_\_\_

How much you paid for the meal during travel (on the way)? \$ \_\_\_\_\_

How many kilometers did you travel? \_\_\_\_\_

How many nights you had temporary living near your new or old residence? \_\_\_\_\_

How much you paid for accommodation during temporary living near your new or old residence? \$ \_\_\_\_\_

How much you paid for meal during temporary living near your new or old residence? \$ \_\_\_\_\_

If you sold your old residence home and/or bought a new home in the new city you are moving to, please give us the information of the costs related to each one.

**\*\*Note:** You should have supporting documents for your claim, but don't send them to us. Keep them in case CRA asked for it. If you don't have all meals and travel expenses(e.g. fuel) receipts just enter the number of dates and we will claim the maximum allowable for you.

#### Additional Information (if there is any):

