

2023 Personal Income Tax Checklist

When in doubt, send it along! Let us decide!

Reporting requirements and housekeeping	Form #	
Signed "Information Return for Electronic Filing of an Individual's Income Tax Return": Please print your first and last name in Part "A" and sign at Part "F". We will fill in the rest.	T183	<input type="checkbox"/>
Direct deposit information - please provide a void cheque (only if you have NOT previously set this up with CRA)		<input type="checkbox"/>
Foreign properties details (bank accounts, real estate, investments, etc.) if the total cost was > \$100,000 Canadian	T1135	<input type="checkbox"/>
Ownership of an interest in a foreign affiliate at any time during 2023	T1134	<input type="checkbox"/>
Requirement to file an Underused Housing Tax Return?	UHT-2900	<input type="checkbox"/>
Requirement to file a T3 Trust Income Tax Return (please see details enclosed)		<input type="checkbox"/>

Please note that we will assume the following answers on your tax return to the questions below unless you inform us otherwise.

Do you have Canadian citizenship?	Yes
Do you authorize the CRA to give your name, address, date of birth and citizenship to Elections Canada to update the National Register of Electors?	Yes
Do you wish to register for online mail by providing your email address to CRA?	No
Do you authorize the CRA to share your name/email address to the Government of Ontario to be contacted about organ/tissue donation?	No

Confidentiality: we assume the following unless instructed otherwise by you

Information delivered by one household member is an indication that completed copies of the tax returns may be picked up by any household member. In addition, we will assume that results of tax returns may be verbally communicated to either spouse but that their children who have reached the age of majority and other household members will be entitled to verbally receive only their own information and vice versa.

If different than above, please provide instructions.

Income source	Form #	
Employment		
Employment, commission, executor's fees, etc.	T4, T4A	<input type="checkbox"/>
Employee profit sharing	T4PS	<input type="checkbox"/>
Employment expenses: if applicable your employer will provide form: <i>Please see list of requirements on our website (www.mmacleancpa.ca)</i>	T2200	<input type="checkbox"/>
For Teachers: Total supplies purchased for the classroom / employer certification		<input type="checkbox"/>
For clients working in the service industry:	Tips: \$ _____	
Pension/retirement		
Pension	T4A	<input type="checkbox"/>
Old age security	T4A(OAS)	<input type="checkbox"/>
Canada pension plan	T4A(P)	<input type="checkbox"/>
RRSP income/withdrawals	T4RSP	<input type="checkbox"/>
RIF income	T4RIF	<input type="checkbox"/>
Investment		
Interest and dividends from bank accounts, securities ownership	T5	<input type="checkbox"/>
Mutual funds and other trusts	T3	<input type="checkbox"/>

Realized gain/loss report from investment advisor	OR	T5008	<input type="text"/>
Bitcoin or other cryptocurrency transactions			<input type="text"/>
Report re: foreign investments from investment advisor		T1135	<input type="text"/>
Fees paid to investment advisor during the year			<input type="text"/>
Interest and other carrying charges paid to earn investment income			<input type="text"/>
Details of sales of ANY properties - indicate if owned for < 365 days			<input type="text"/>
Did you receive interest, dividends or benefits from a business in which a relative is a key party in terms of ownership or involvement?			<input type="text"/>

Other sources

Honorariums, scholarships, bursaries	T4, T4A	<input type="text"/>
Partnership income	T5013	<input type="text"/>
Employment insurance benefit	T4E	<input type="text"/>
Alimony; spousal support receipts (include copy of separation agreement or court order)		<input type="text"/>

Self employment: Farming, Business (includes Uber), Professional, or Commission

Please see list of requirements on our website (www.mmacleancpa.ca)	<input type="text"/>
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Rental property (includes Airbnb, VRBO, etc.)

Please see list of requirements on our website (www.mmacleancpa.ca)	<input type="text"/>
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Sale of principal residence during 2023

Address, year purchased; sale price; ownership %; any secondary residences e.g. a cottage?	<input type="text"/>
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Deductions and credits - general	Form #
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RRSP contributions	RRSP	<input type="text"/>
Home Buyers Plan withdrawals or repayments		<input type="text"/>
Lifelong Learning Plan withdrawals or repayments		<input type="text"/>
Tuition fees (if transferring part of the credit to another taxpayer such as your parents, please sign the back/2nd page)	T2202	<input type="text"/>
Canada Training Credit: receipts for work-related training; include details of any reimbursements		<input type="text"/>
Interest paid on student loans		<input type="text"/>
Charitable or political donation receipts		<input type="text"/>
Professional/union dues		<input type="text"/>
Medical expenses		<input type="text"/>
List of eligible expenses: http://www.cra-arc.gc.ca/medical/#mdcl_xpns		
Please ask your pharmacist for an annual statement of your prescriptions or provide total		
Eligibility for the disability tax credit? (approval received from CRA)	T2201	<input type="text"/>
Do you have a relative who is dependant on you due to a mental or physical infirmity?		<input type="text"/>
Rent paid - please include receipts		<input type="text"/>
Total property taxes paid		<input type="text"/>
Alimony; spousal support paid (include copy of separation agreement or court order)		<input type="text"/>
Moving expenses (if you moved > 40 kms for job related purposes)		<input type="text"/>
Child care expenses for children who were < 16 yrs at some time in the year		<input type="text"/>
Home renovation (to improve accessibility) expenses if there is someone living at your residence who is 65 or older and/or claiming the disability tax credit		<input type="text"/>
Home renovation expenses to create a secondary dwelling unit to permit a qualifying relation who is 65 or older and/or claiming the disability tax credit to live with you		<input type="text"/>
Are you a first time home buyer in 2023?		<input type="text"/>
Did you open a first home savings account (FHSA) during 2023?		<input type="text"/>
Instalments paid to the CRA for 2023 income tax		<input type="text"/>