

## PERSONAL INCOME TAX CHECKLIST 2023

1. **Your Name(s):** We ask you to prepare personal income tax returns for the following persons:

\_\_\_\_\_

2. Your final package will be delivered electronically (no paper)

If you would like a paper package as well, please select one of the following delivery methods:

Picked Up by Us or  Mailed to Us or  Couriered to Us (Courier charges will apply)

3. E-filing is required by CRA. The best email address to send the e-file consent (form T183):

Email: \_\_\_\_\_ Phone #: \_\_\_\_\_ (Is this your cellular? Y / N)

4. Marital status: if changed in the year, provide details and date \_\_\_\_\_

5. List of dependents including names, Social Insurance Number and birthdates (please attach list).

### Information slips for the following income:

- T4 Employment
- T4A Pension, Retirement, Annuity, Other
- T4A(P) CPP
- T4A(OAS) Old Age Security
- T4E Unemployment Insurance
- T5/T600 Dividends, Interest and Annuities
- T3 Mutual Income Fund and Trust
- T101 Tax Shelters
- T4RSP Withdrawals from RRSP
- T4RIF Withdrawals from RRIF
- T5013 Limited Partnership
- T5008 Statement of Securities Transactions

### Receipts for the following:

- RRSP contributions
- Moving Expenses – *see form TIM on website\**
- Accounting/Legal Fees
- Tuition Fees/Education Deduction (T2202A)
- Foreign Tuition Form – *see TL11A on website\**
- Investment Counsel Fees
- Interest Paid on Investments
- Interest Paid on Student Loans
- Caregiver Amount
- BC Venture Capital Tax Credit
- Child Care Expenses
- Charitable & Political Donations
- Medical/Attendant Care Expenses – *see website\**

### Documents for the following transactions:

- Real Estate Sales or Purchases
- Disposition of Principal Residence – *see website\**
- Changed use of part of home (i.e.: to rental space)
- Stocks/Bonds/Mutual Funds Sales and/or Purchases
- Commodities, Purchases and Sales
- Tax Shelters, Purchases and Sales

If you wish for us to contact your investment advisor directly, please provide his or her most up to date contact information: \_\_\_\_\_

### Provide details of:

- Deductible Employment Expenses – *see form T777 on website\**
- New Automobile Lease (if you claim car expenses)
- Alimony/Maintenance Paid/Received (Ex-Spouse SIN)
- Union/Professional Dues
- Foreign Income, Expenses and Taxes Paid
- Business/Professional Income – *see form T2125 on website\**
- Capital Gains/Losses – *see website\**
- Rental Income and Expenses – *see form T776 on website\**
- RRSP Home Buyer's Plan – Withdrawals and Repayments
- Disability Credit (if new for 2021)

### Other items:

- Foreign Property, Stocks and/or Bonds with a Canadian Dollar Cost in Excess of \$100,000
- Transactions with Non-Resident Trusts
- Change in Use or Sale of Property (Principle residence to rental property or vice versa)
- Short term rental income (i.e. AirBnb, VRBO etc.) and GST
- Crypto-currency statements of information

6. **Don't Forget**

The Engagement and Representation letter(s) have been signed and enclosed.

All required info on the checklist is enclosed. If not, I/We have listed the nature of the outstanding info including amounts:

\_\_\_\_\_

\*website address: [www.horizoncpa.ca](http://www.horizoncpa.ca)

Client Resources link in bottom banner <https://horizoncpa.ca/client-resources/>