***2023 GENERAL PERSONAL TAX RETURN CHECKLIST***

**Please review the information and make any corrections as necessary.**

Name: Name: Marital Status:

Our records indicate your dependents are as follows:

Name: Birth date: YYYY/MM/DD

Name: Birth date: YYYY/MM/DD

*Have there been any changes, errors, or omissions with respect to your dependents?* **YES / NO**

If yes, please indicate changes.

**Canada Revenue Agency filing conditions require that we have all correct personal information in order for the returns to be accepted as filed.**

Address:

Phone #: Cell #:

Email address:

*Have there been any changes, errors, or omissions with respect to your contact information?* **YES / NO**

If yes, please indicate changes.

**PLEASE CHECK APPLICABLE ITEMS AND PROVIDE SUPPORTING DOCUMENTATION**

Did you make any tax instalments for 2023? **YES / NO If** yes, please provide any correspondence from the Canada Revenue Agency and/or information on the amount paid?

Name: ($ ) Name : ($ )

Other than the Notice of Assessment for your tax return, did you receive any other correspondence from the Canada Revenue Agency? **YES / NO** If yes, is a copy of this correspondence attached?

***Income (Please circle and provide all information slips)* Office Use**

­YES NO N/A T4 – Employment income

­YES NO N/A T3 – Trust income

­YES NO N/A T5 – Interest and dividends

­YES NO N/A T5013 – Partnership income

­­­­YES NO N/A AGR-1 – Statement of Farm-Support Payments

YES NO N/A T4A – Pensions and other income **(indicate if patronage**

**income is from consumable goods)**

­YES NO N/A T4A(P) – Statement of Canada Pension Plan Benefits

YES NO N/A T4A(OAS) – Statement of Old Age Security

YES NO N/A T4E – Employment insurance

­YES NO N/A T4RSP – RRSP withdrawals

­YES NO N/A T4RIF – RRIF payments

­YES NO N/A T5007 – Alberta Statement of Benefits

­YES NO N/A T5008 – Statement of Securities Transactions

­YES NO N/A T4PS – Statement of Employee Profit-Sharing

YES NO N/A All other tax slips not mentioned above

YES NO N/A Canada Emergency Business Account (**CEBA**)– did repay any

CEBA funds this year

If yes was there any balance forgiven that we need to include

in income $\_\_\_\_\_\_\_\_\_

­YES NO N/A Business income – (Complete business worksheets or

provide a statement of income and expenses)

­YES NO N/A Farm income – (Complete farm worksheets)

**­­YES NO N/A AgriInvest Pin Number #\_\_\_\_\_\_\_\_\_\_**

YES NO N/A Rental property – (Complete rental worksheets)

­YES NO N/A Capital property – Please provide sales detail and original cost

of the asset (i.e. Sale of shares)

­­­­YES NO N/A Home Buyer’s Plan (HBP) repayment on RRSP ($\_\_\_\_\_\_\_\_ )

­­­­YES NO N/A Lifelong Learning Plan (LLP) repayment

on RRSP ($\_\_\_\_\_\_\_\_ )

YES NO N/A Alimony payments received during 2023 ($\_\_\_\_\_\_\_\_ )

­YES NO N/A Scholarships, bursaries, or grants ($\_\_\_\_\_\_\_\_ )

­YES NO N/A Other sources of income, not reported on a T-slip or included

above. ($\_\_\_\_\_\_\_\_ )

***Deductions (Please provide all applicable receipts)***

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YES NO N/A RRSP purchases and contributions

­YES NO N/A Investment expenses (e.g. interest, management fees)

­YES NO N/A Union, professional or like dues

YES NO N/A Child care expenses (please provide the child’s name, social

insurance number, and the amount of expenses)

­YES NO N/A Moving expenses, if move is greater than 40kms

for work or school ($\_\_\_\_\_\_\_\_ )

­­YES NO N/A Interest paid on student loans (provide annual statement)

YES NO N/A Alimony or deductible child support payments paid during 2023

­YES NO N/A Employment expenses incurred for which you are not reimbursed

YES NO N/A Northern Residents travel

- complete attached travel worksheet

YES NO N/A Other deductions not listed above. ($\_\_\_\_\_\_\_\_ )

***Non-Refundable Tax Credits (Please provide all applicable receipts)***

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YES NO N/A Tuition receipts (T2202) which are acquired through

the student’s online account on the institution’s website

­YES NO N/A Medical expenses – complete the attached worksheets

­YES NO N/A Donations – must have charitable registration # ($\_\_\_\_\_\_\_\_ )

­YES NO N/A Political contributions. Federal: ($\_\_\_\_\_\_\_\_ ) Provincial: ($\_\_\_\_\_\_\_\_ )

***Foreign Property (Please circle the appropriate answer)***

Do you own foreign property greater than $100,000? (T1135) **YES / NO**

Do you have any dealings with non-residents trusts or corporations? (T1141/T1142) **YES / NO**

**DID YOU SIGN AND RETURN YOUR ENGAGEMENT LETTER? YES / NO**