

INVISION CHARTERED PROFESSIONAL ACCOUNTANTS

2023 GENERAL PERSONAL TAX RETURN CHECKLIST

Please complete the following.

Name: _____ Birth Date: _____ Marital Status: _____

Name: _____ Birth Date: _____

Address: _____

Phone #: _____

Please advise of any changes in the status of dependants throughout 2023.

If you would like us to email your tax return and invoice to you (instead of mail), please provide your email address: _____

PLEASE CHECK APPLICABLE ITEMS AND ATTACH SUPPORTING DOCUMENTATION

Visit our website: www.invisioncpa.com for additional worksheets

- _____ Did you make any tax installments for 2023? (\$ _____) (\$ _____)
- _____ Please indicate if you will be away in March/April (NO/YES - Dates: _____)
- _____ Did you change banks? If yes, please provide a void cheque so we can update direct deposit info.

Principal Residence (Please provide applicable description of property, year of acquisition, and proceeds of disposition)

- _____ Did you purchase or sell your home or vacation property? (includes property outside of Canada)
- _____ Did you begin renting out a portion or all of your home or vacation property?
- _____ Did you convert a rental property into your principal residence?

Underused Housing Tax (Please provide property descriptions and property tax notices)

- _____ Do you have residential property requiring a UHT-2900 form?
- _____ Do you need our office to file form(s) UHT-2900?

Income (Please provide all information slips)

- _____ T4 - Employment income
- _____ T3 - Trust income
- _____ T5 - Interest and dividends
- _____ T5013 - Partnership income
- _____ T4A(OAS) - Old age security
- _____ T4A(P) - Canada Pension Plan
- _____ T4A - Pensions and other income (**indicate if patronage income is from personal consumption**)
- _____ T4E - Employment insurance
- _____ T4RSP - RRSP withdrawals
- _____ T4RIF - RRIF payments
- _____ All other tax slips not mentioned above
- _____ Business income - (Complete business worksheets or provide a statement of income and expenses)
- _____ Farm income - (Complete farm worksheets)
- _____ Rental property - (Complete rental worksheet)
- _____ Spousal support payments received during 2023 (\$ _____)
- _____ Scholarships, bursaries or grants (\$ _____)
- _____ Other sources of income, not reported on a T-slip or included above (\$ _____)
- _____ Purchases or sales of investments, including cryptocurrency transactions (excluding RRSP and TFSA). Please provide your trading summary from your investment statements for sales detail and original cost information

Deductions (Please provide all applicable receipts)

- RRSP purchases and contributions (including purchases and contributions Jan 1, 2024 - Feb 29, 2024)
- RRSP withdrawal for the Home Buyer's Plan or Lifelong Learning Plan
- Investment expenses (e.g. interest or management fees)
- Union, professional or like dues
- Child care expenses (Provide social insurance number for individuals paid to)
- Moving expenses (if move is greater than 40 Kms for work)
- Spousal support payments paid during 2023 (\$_____)
- Employment expenses incurred for which you are not reimbursed
- Northern Residents travel - complete attached travel worksheet. (Available to all residents in Northern Zones)

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

- Tuition receipts (T2202), exam fees and other training/course fees
- Interest paid on student loans in 2023 (carry forward up to 5 years)
- Medical expenses (complete attached worksheets)
- Donations or Political contributions

Foreign Property (Please circle the appropriate answer)

- Did you own foreign property greater than \$100,000? (T1135)
- Do you have any dealings with non-resident trusts or corporations? (T1141/T1142)