



Tel: 250-248-3211 Fax: 250-248-4504

## 2023 Personal Tax Return Checklist

Name(s)			
Address			
Email Address	Phone#	<u> </u>	Cell#
Please answer all questions and provide details:			Details/additional information
Did your marital status change in 2023 (including common law)? (Please provide a copy of separation agreement)	Yes □	No 🗆	
Do you have any new dependants?	Yes □	No □	
Are you a Canadian Citizen?	Yes □	No □	
If you are a Canadian Citizen, do you want your name, address, and date of birth provided to Elections Canada?	Yes □	No □	
Did you own any foreign property at any time in 2023 (eg. foreign investments, real estate, etc.)?	Yes □	No 🗆	
If your banking information changed in 2023, would you like us to update your direct deposit information?	Yes □	No □	
INCOME:			
Have you provided us with all of the T4, T5 and/or T3 slips that you expect to receive?	Yes □	No □	
Did you sell any stocks or bonds?	Yes □	No □	
Did you sell any real estate (other than your home)?	Yes □	No □	
Did you buy a new home?	Yes □	No □	
Did you sell your home (principal residence)?	Yes □	No □	
Please provide: address, year of acquisition, original purchase price, proceeds of disposition	)		
Did you have any other sources of income in 2023?	Yes □	No 🗆	

PLEASE SEE THE BACK OF THIS FORM FOR ADDITIONAL QUESTIONS AND TO ADD ANY OTHER INFORMATION





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DEDUCTIONS AND CREDITS:		
Did you make an RRSP contribution for 2023?	Yes □ No □	
Did you pay any tax installments?	Yes □ No □	
Did you work from home during 2023 due to		
Covid-19? (if you are an employee)		
Please provide: dates worked at home,		
T2200S or T2200 (if applicable)	Yes □ No □	<del></del> ,
Have you provided us with information regarding:		
Are you an apprentice?	Yes □ No □	
Interest <u>paid</u> on loans used for investing	Yes $\square$ No $\square$	
Investment management fees	Yes □ No □	
Union dues	Yes $\square$ No $\square$	
Tuition fees (yourself or dependant)	Yes $\square$ No $\square$	
(Please have student sign before bringing in)		
Moving expenses	Yes $\square$ No $\square$	
Employment expenses	Yes $\square$ No $\square$	
Alimony (spousal support)	Yes $\square$ No $\square$	
Childcare (daycare, camps)	Yes $\square$ No $\square$	
Donations/political contributions	Yes $\square$ No $\square$	
Medical expenses (including travel)	Yes $\square$ No $\square$	
Do you have a medical plan?	Yes $\square$ No $\square$	
RRSP (including Home Buyers plan repayment)	Yes $\square$ No $\square$	
Trades person's tool expenses	Yes $\square$ No $\square$	
Volunteer firefighter's amount	Yes □ No □	
ADDITIONAL INFORMATION:		