



**2023 Personal Tax Return Checklist**

Name(s) \_\_\_\_\_  
Address \_\_\_\_\_  
Email Address \_\_\_\_\_ Phone# \_\_\_\_\_ Cell# \_\_\_\_\_

**Please answer all questions and provide details:**

**Details/additional information**

Did your marital status change in 2023  
(including common law)? Yes  No  \_\_\_\_\_  
**(Please provide a copy of separation agreement)**

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**

