

Personal Income Tax Checklist

Tax Year: _____

Name: _____

Phone Number: _____

E-mail: _____

For accuracy in preparing your return, please answer the questions below by checking the boxes

Notice of Assessment and other documents received from CRA	Yes	No	Enclosed
Is this the first year you are filing your personal income tax return?	Yes	No	
If Yes , please provide your middle name: _____			

Family Information

Provide your spouse's **202** net income (line 23600) (if we do not prepare your spouse's return) \$ _____

Name and date of birth of any children born in **202** : _____

For purpose of the transfer to you of the student's tuition, we require your child's taxable income (line 23600) for **202** (if we do not prepare your child's income tax return): \$ _____

Housing

Sale of Principal residence within the tax year (Year purchased and proceeds of sale)	Yes	No	Enclosed
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First-time Home Buyer Closing cost on home purchase (Closing costs on home purchase)	Yes	No	Enclosed
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Multi Generational or Healthy Homes Renovation Tax Credit (Renovation cost)	Yes	No	Enclosed
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Provide details of Rent or Property Tax Paid:

Property/Rental Address _____

Municipality/Landlord _____

Amount \$ _____

HAMILTON OFFICE

7th Floor – 105 Main St E Phone: 905-523-0000
Hamilton, ON L8N 1G6 Fax: 905-523-4681

BURLINGTON OFFICE

202 – 3310 South Service Rd Phone: 905-523-0000
Burlington, ON L7N 3M6 Fax: 905-523-4681

Income

T4 – Employment Income	Yes	No	Enclosed
T4A (OAS) – Old Age Security	Yes	No	Enclosed
T4A (P) – Canada Pension Plan Benefits	Yes	No	Enclosed
T4A – Other Pensions	Yes	No	Enclosed
T4RSP – Registered Retirement Savings Plan	Yes	No	Enclosed
T4RIF – Registered Retirement Income	Yes	No	Enclosed
T4E – Employment Insurance	Yes	No	Enclosed

Other Income

T5 – Investment Income (Interest, Dividends, Canada Savings Bonds, etc.)	Yes	No	Enclosed
T3 – Mutual Fund, Trust & Estate Income	Yes	No	Enclosed
T5013 – Partnership Income	Yes	No	Enclosed
Spousal Support Received	Yes	No	Enclosed
Rental Property Income (Income expenses, purchases & sales)	Yes	No	Enclosed
Capital Gains or Losses – sale of stocks, bonds, real estate, etc. (Date of sale, sale proceeds, original cost & selling cost)	Yes	No	Enclosed
Crypto Assets – Purchase and sales (Date of purchase/sale, cost/sales proceeds)	Yes	No	Enclosed
Scholarship, Bursaries, Annuities, Grants and/or Workers' Compensation Benefits, RESP, Stock Options, Annuities, Research Grants, Bursaries	Yes	No	Enclosed
Self-employed Income – Business, Professional, Farming (T5013 slip or Financial Statement required and prior year HST Notice of Assessment)	Yes	No	Enclosed

Deductions and Credits

RRSP Contributions - Amount \$ _____	Yes	No	Enclosed
RRSP – Home Buyers Plan / Life Long Learning Plan- Withdrawals	Yes	No	Enclosed
FHSA Contributions – T4FHSA	Yes	No	Enclosed
Annual Dues – Union, Professional, etc.	Yes	No	Enclosed
Child Care Expenses (Provider's Name, SIN, Address & Number of Weeks)	Yes	No	Enclosed
Attendant Care Expenses	Yes	No	Enclosed
Moving Expenses	Yes	No	Enclosed

Canada Caregiver Amount	Yes	No	Enclosed
Alimony or Support Payments	Yes	No	Enclosed
Carrying Charges – interest on borrowed or earned investment income, limited partnership, investment counselling fees	Yes	No	Enclosed
Employment or Commission Expenses (Form T2200, TL2 or T2200s)	Yes	No	Enclosed
Disability Deduction (Form 2201 signed by Physician – 1 st year only)	Yes	No	Enclosed
Home Accessibility Tax Credit – seniors & people with a disability (T2202 for self & dependents)	Yes	No	Enclosed
Tuition Fees	Yes	No	Enclosed
Interest Paid on Student Loans	Yes	No	Enclosed
Medical Expenses & Private Health Service Plan Premiums	Yes	No	Enclosed
Charitable Donations & Gifts	Yes	No	Enclosed
Political Donations to Federal & Provincial Governments	Yes	No	Enclosed
School Supply Tax Credit – Eligible Educator	Yes	No	Enclosed
Other Deductions or Expenses: _____	Yes	No	Enclosed

Income Tax Instalments paid in the tax year? Yes No
If **Yes**, please provide: \$ _____

Foreign Reporting Requirements

Did you own or hold foreign property at any time in the tax year with a total cost of more than \$100,000 CDN? (Includes shares and investments in foreign corporations)	Yes	No
In the tax year or a previous year, did you loan or transfer funds or property to a non-resident trust?	Yes	No
In the tax year, did you receive funds or property from, or were you indebted to a non-resident trust in which you had or will have absolute or conditional rights as a beneficiary either directly or indirectly?	Yes	No
In the tax year, did you have interest in a foreign affiliate?	Yes	No
If you are unsure of the Foreign Reporting Rules, would you like us to contact you to discuss your reporting requirements?	Yes	No

Please provide the number of days you were present in the United States during:

2023 _____, 2024 _____, 2025 _____

Please contact **Taylor Leibow** if you answered **Yes** to any of the Foreign Reporting Requirements and if you are unsure of the Foreign Reporting Rules

Elections Canada

Are you a Canadian citizen?	Yes	No
Do you agree to CRA providing Elections Canada your information for the National Register of Electors?	Yes	No
Are you a citizen of United States of America?	Yes	No

Other Information

Do we file your HST Return for you? If Yes , please provide supporting documentation for HST collected and HST paid.	Yes	No	Enclosed
Do you have any cash or investments held in trust for someone that exceeds a total aggregate fair market value of \$250,000 at any point during the year? If Yes , additional tax filings may be required.	Yes	No	
Is there any other tax information not addressed above? If Yes , please enclose details of other pertinent income tax information.	Yes	No	Enclosed

Notes:

HELPFUL TIPS TO FOLLOW IN ORGANIZING YOUR PERSONAL TAX RETURN INFORMATION

In order for us to prepare your return accurately and efficiently, read and consider the following helpful items:

- Read our checklist and complete it as required.
- Organize your material.
- We prefer that you compile your documents electronically. Once you have them compiled electronically, you can email documents@taylorleibow.com and a secure link will be sent to you to allow your documents to be uploaded.
- If you are submitting your materials in hard copy, please bring it in early to eliminate the last-minute rush and reduce the opportunity for errors.
- Open envelopes, remove and organize T3, T4, T5, RRSP and other slips.
- Medical expenses – provide receipts and the total amount of medical claims.
- Charitable donations – provide receipts and the total amount of donation claims. (All receipts require an official charitable registration number.)
- Business expenses – summarize total revenue and expenses and provide the total amounts by the following categories. *Do not provide us with your paid bills.*
 - Advertising, business tax, fees, licenses and dues, insurance, interest, maintenance, meals and entertainment, motor vehicle expenses, office expenses, supplies, purchases, professional fees, property taxes, rent, salaries and wages, travel, telephone and utilities, and other expenses.
- Securities – If you have sold shares, bonds or other similar securities, provide us with **the sales price, cost and broker's** commissions paid for each security sold and the annual **broker's trading summary**. *Do not provide us with your broker slips.*

HELPFUL TIPS TO FOLLOW IN ORGANIZING YOUR PERSONAL TAX RETURN INFORMATION

- Rental income – summarize total rental revenue and expenses and provide the total amounts by the following categories. *Do not provide us with your paid bills.*
 - Advertising, insurance, interest, maintenance, administration fees, motor vehicle expenses, office expenses, professional fees, property taxes, travel, utilities and other expenses.
- Home office expenses – summarize and provide the total amounts by category as follows:
 - Provide your percentage of business or employment use.
 - Heat, hydro, insurance, maintenance, mortgage interest, property taxes and other expenses.
- Motor vehicle expenses – summarize and provide the total amounts by category, as follows:
 - Provide your percentage of business or employment use.
 - Fuel and oil, maintenance and repairs, insurance, licenses, interest, lease payments, parking, car washes, automobile club and other expenses.
- Foreign Property – Provide details if you owned foreign property at any time during the year with a cost of greater than \$100,000 CDN.
- Additional information or questions – please provide additional information if required or call us.