



2023 INCOME TAX RETURN CHECKLIST
 (Please complete and return with your tax information)

Please use this checklist to help organize all the items required to complete your tax return. Please check off appropriate boxes. Please be sure to advise us of any changes in address or marital status.

If you, or a family member, have become disabled during the year you may be eligible for additional tax credits.

If you have had a child enter your family ensure that you provide a name, a date of birth and the sex of your child.

Name: _____

Name: _____

Children: _____

Phone: _____ (during day) _____ (home) _____ (cell phone)

Email: _____

NOTE: **Canada Revenue Agency (CRA) requires that if you owned foreign income producing property with a cost of more than \$100,000 (Cdn) at any time during 2023 you must provide certain information on your tax return. Please advise us if this applies to you.**

CRA now requires taxpayers to report the sale of any real estate. This rule will apply even if the property is your principal residence. Please advise us if you sold any property in 2023.

	'X'	Additional information
INCOME:		
Employment: (T4, T4A)	<input type="checkbox"/>	_____
Investment/interest/dividends: (T3, T5, T5013)	<input type="checkbox"/>	_____
Pensions:		
RRSP/RRIF/Annuities	<input type="checkbox"/>	_____
Canada Pension	<input type="checkbox"/>	_____
Old Age Security	<input type="checkbox"/>	_____
Employer	<input type="checkbox"/>	_____
Foreign sources	<input type="checkbox"/>	_____
Business (complete schedule which can be found at www.blrcpa.ca):	<input type="checkbox"/>	_____
Rental property (complete schedule which can be found at www.blrcpa.ca):	<input type="checkbox"/>	_____
Capital gains/losses: - Sale of investments - provide information on original cost, proceeds, expenses, dates		
- Broker statements or summaries would be very helpful	<input type="checkbox"/>	_____
- Annual statements from Mutual Fund companies		
Other income (please provide details on separate page):		
- Spousal support	<input type="checkbox"/>	_____
- Other sources of income for which no slips were received.	<input type="checkbox"/>	_____

CHECKLIST CONTINUED:

Additional information

'X'

DEDUCTIONS

RRSP contributions: receipts required

Union or professional dues: (if not included on your T4)

Child care: Provide name, address and SIN of caregiver, if applicable
If your child attended an overnight camp
provide the number of weeks at camp.

Carrying charges: interest
management fees

Employment/commission expenses (complete employment expense schedule (www.blrcpa.ca)
- include T2200 or T2200S from your employer)

Spousal and child support payments (provide breakdown between child and spousal support)
Moving expenses (contact us if you moved 40 kms closer to a new place of work)

NON-REFUNDABLE TAX CREDIT INFORMATION

Tuition fees for self or dependants - obtain the T2202 via the student's access to the school's
website and have dependants sign the T2202 where requested

Medical expenses paid, including health insurance premiums
- enclose all receipts
- **for prescriptions consider obtaining a summary from your pharmacy**
- **all pages are required**

First-time home buyers' credit (include agreement of purchase and sale)
Charitable donations (include receipts)
Political donations (include receipts)
Interest paid on student loans (official statement required)

PROVINCIAL TAX CREDIT INFORMATION

Rent or property tax paid on principal residence
(obtain and include receipts displaying address and landlord's name if you rent)
(provide copy of final property tax bill if you own)

INCOME TAX INSTALMENTS MADE DURING THE YEAR

Are you a U.S. citizen, a U.S. green card holder or were you born in the U.S.?

Yes

No

CRA, in conjunction with Elections Canada, asks whether or not you will
give your consent to provide Elections Canada with your name, address and date of birth only.
I am a citizen of Canada

Yes

No

The purpose of this is to keep the National Register of Electors up to date for future elections. Would
you please indicate your decision on this matter below.

Yes, consent given

No, consent denied