

ACCOUNTING | TAX | ADVISORY

## 2023 PERSONAL TAX CHECKLIST

Check out our Newsletter: [The Balance Sheet](#)

Return this completed form with all relevant documentation to our office no later than **April 16<sup>th</sup>, 2024**, to ensure we can **E-File your return by 5:00 p.m. on April 30, 2024**. It is imperative that you sign and return your E-File Authorization Form by April 30<sup>th</sup>, 2024.

Name: \_\_\_\_\_ Date of birth: \_\_\_\_\_  
Address: \_\_\_\_\_ Marital status: \_\_\_\_\_  
\_\_\_\_\_ SIN: \_\_\_\_\_  
Home phone: \_\_\_\_\_ Cell: \_\_\_\_\_ Work phone: \_\_\_\_\_  
Email: \_\_\_\_\_ Ext: \_\_\_\_\_

Please enclose (upload to our **ShareFile** site) all slips, receipts, and supporting documentation (summarized if possible)

**NEW CLIENTS** – Please provide us with the last tax return you filed

Attach this checklist to your submission

Did you sell your principal residence? If yes, we need the year of acquisition, sale proceeds and address  Yes  No  
Provide information to Elections Canada?  Yes  No  
Were you born in the USA, or are you a US citizen / Green Card holder?  Yes  No  
Did you own foreign stocks or property with a cost greater than \$100,000 at any time during the year?  Yes  No  
Authorize CRA to share your name and email for maintenance of the Organ and Tissue Donor Registry?  Yes  No  
Did you REPAY COVID-19 benefits in 2023? provide details for a tax deduction.  Yes  No

### DEPENDANT INFORMATION

Name(s)	Date(s) of Birth	SIN	Income
_____	_____	_____	_____
_____	_____	_____	_____

**Drag and Drop your documents to us!**

**Request access to our ShareFile web portal:**

In Newmarket: Gelareh Abdollahian [info@sslgroup.ca](mailto:info@sslgroup.ca)

In Barrie: Anne Ffrench [anne.fffrench@sslgroup.ca](mailto:anne.fffrench@sslgroup.ca)

## EMPLOYMENT INCOME AND DEDUCTIONS

- |   |                          |   |                          |
|---|--------------------------|---|--------------------------|
| Employment income - provide T4                      | <input type="checkbox"/> | Detailed employment expenses - provide signed T2200 | <input type="checkbox"/> |
| Commission, other employment income - T4A           | <input type="checkbox"/> | Annual union / prof. dues – provide receipts        | <input type="checkbox"/> |
| Employment insurance & other benefits - provide T4E | <input type="checkbox"/> | Moving expenses related to employment - call us!    | <input type="checkbox"/> |

Access worksheets for employment expenses on our Forms page at [www.sslgroup.ca/forms](http://www.sslgroup.ca/forms)

- Or -



[Employment Expenses Worksheet](#)



[Allowable Vehicle Expense Worksheet](#)



[Home Office Expense Worksheet](#)

## RETIREMENT INCOME AND DEDUCTIONS

- |   |                          |  |                          |
|---|--------------------------|--|--------------------------|
| Pensions and annuities - provide T4A              | <input type="checkbox"/> | Split pension income with your spouse                              | <input type="checkbox"/> |
| Old Age Security pension - provide T4A(OAS)       | <input type="checkbox"/> | RRSP withdrawals - provide T4RSP                                   | <input type="checkbox"/> |
| Canada Pension Plan benefits - provide T4A(P)     | <input type="checkbox"/> | RRSP Contribution slips - up to Feb 29, 2024                       | <input type="checkbox"/> |
| Registered Retirement Income Fund - provide T4RIF | <input type="checkbox"/> | <a href="#">FHSA</a> Contribution slips - up to Dec 31, 2023 (New) | <input type="checkbox"/> |
| Foreign pension income                            | <input type="checkbox"/> |  |                          |

## INVESTMENT INCOME AND DEDUCTIONS

- |  |                          |  |                          |
|--|--------------------------|--|--------------------------|
| Mutual fund and trust income - provide T3          | <input type="checkbox"/> | Gains and losses from the sale of investments - provide:   | <input type="checkbox"/> |
| Interest, dividend and other income - provide T5   | <input type="checkbox"/> | - Monthly investment statements                            |                          |
| Partnership income - provide T5013                 | <input type="checkbox"/> | - Annual trading summary                                   |                          |
| Securities transactions statements - provide T5008 | <input type="checkbox"/> | - Details of original cost when purchased (price and date) |                          |
| Other / foreign income, i.e. U.S. income slips     | <input type="checkbox"/> | Interest expense and investment management fees            | <input type="checkbox"/> |

Did you sell investment property (cottage, rental or other)? Consider new [anti-flipping rules](#) – contact us for details

## OTHER SOURCES OF INCOME AND DEDUCTIONS

- |   |                          |   |                          |
|---|--------------------------|---|--------------------------|
| Rental income and expenses  | <input type="checkbox"/> | Childcare expenses - provide invoices, or name and      | <input type="checkbox"/> |
| Self-employment income and expenses   | <input type="checkbox"/> | <i>SIN of caregiver</i>                                 |                          |
| (Collecting CPP & between ages 65 & 70? Elect to stop CPP contributions <input type="checkbox"/> Yes <input type="checkbox"/> No) |                          | Received or paid child and/or spousal support – provide | <input type="checkbox"/> |
|   |                          | amounts, name and SIN of recipient                      |                          |

Access worksheets for SELF-EMPLOYMENT & RENTAL income/expense on our Forms page, at [www.sslgroup.ca/forms](http://www.sslgroup.ca/forms)

- Or -



[Business Income & Expense Worksheet](#)



[Allowable Vehicle Expense Worksheet](#)



[Home Office Expense Worksheet](#)



[Rental Income/Expense](#)

## TAX CREDITS

- |   |                          |   |                          |
|---|--------------------------|---|--------------------------|
| Medical expenses, (have your pharmacy print an annual summary of prescriptions) | <input type="checkbox"/> | Digital subscription receipts                                   | <input type="checkbox"/> |
| Health and travel insurance premiums  | <input type="checkbox"/> | Disability - provide T2201 certificate                          | <input type="checkbox"/> |
| Nursing / retirement home annual invoice  | <input type="checkbox"/> | Property tax and/or rent paid - provide receipts                | <input type="checkbox"/> |
| Donations   | <input type="checkbox"/> | First-time home buyer   | <input type="checkbox"/> |
| Tuition - provide T2202 (signed if parent is claiming)                          | <input type="checkbox"/> | Public transit passes (65 years of age or older)                | <input type="checkbox"/> |
| Student loan interest   | <input type="checkbox"/> | Home accessibility tax credit                                   | <input type="checkbox"/> |
| Eligible fees paid for <a href="#">Canada training credit</a>                   | <input type="checkbox"/> | Teacher / ECE school supplies                                   | <input type="checkbox"/> |
|   |                          | <a href="#">Multigenerational home renovation (MHRTC)</a> (New) | <input type="checkbox"/> |