

## 2023 Personal Tax Checklist

Client Name: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

- Sign me up for the newsletter
- I prefer to be contacted through e-mail rather than physical correspondence

Address: \_\_\_\_\_  
Street Address Prov. Postal Code

Phone: \_\_\_\_\_ Cell: \_\_\_\_\_ Work: \_\_\_\_\_

Birth date: \_\_\_\_\_

S.I.N.: \_\_\_\_\_

Marital Status: \_\_\_\_\_

**Dependents**

Name	S.I.N	Birth date	Net Income (if applicable)
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

### **INCOME**

**Personal Income**

- T4, T4A – Salaries and Employment Income
- Other Employment Benefits
- T4A (P) – CPP Benefits
- T4(OAS)- Old Age Security Benefits
- T4A – Other Pensions or Superannuation
- T4RIF – RRIF Income
- T4E – Employment Insurance Benefits
- T5007 – Social Services Benefits
- T11137 – Statement of Account – Home Buyer’s Plan
- T4RCA – Retirement Income

**Investment Income**

- T3, T5, T4PS – Interest and Dividends
- T5008 – Statement of Security Transactions
- Interest on 2023 Tax Refund
- T6000 – Canada Savings Bonds
- T3 – Income from Mutual Funds
- Annuities
- Rental Income\*
- T5013 – Net Partnership Income (Loss) any Limited Partnership
- Capital Gain/Losses (Full details required)



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 web: www.HarmonicTeam.com

**Other Income**

- Alimony Received
- Taxable Child Support Received
- Scholarship/Bursaries
- Professional Earnings

**Non-Refundable Credit**

- Married Amount – Spouse’s Net Income \$\_\_\_\_\_
- Equivalent to Married Amount
- Disability Deductions (Full details required)
- T2202 – Tuition Fees/Education Credit
- T2202 – Tuition Fees/Education Credit for Dependent
- Dependent’s Net Income \$\_\_\_\_\_
- Interest Paid on Student Loans
- Medical Receipts
- Charitable Donations
- Dependent Data (For GST Credit and Child Tax Benefit)

**OTHER INFORMATION**

- 2022 Notice of Assessment
- Summary of 2023 Installment Payments
- Details on Foreign Property held in 2023 where total cost exceeded \$100,000 Cdn - *This includes foreign shares held in Canadian trading accounts*

**Business**

- Employment Earnings
- Farming/Fishing Earnings
- Other – Specify
- Self-Employed Commission earnings \*

**Other Deductions**

- RRSP Receipts
- Union, Professional Dues
- Alimony Paid
- Deductible Child Support Paid
- Safety Deposit Box Charges
- Interest Carrying Charges on Investments
- Investment Counsel and Accounting Fees
- Employment Expenses \*
- E.I. Repaid
- Deductible Legal Fees
- T2200 Declaration of Condition of Employment\*
- TL2 – Claim for Board & Lodging Expenses
- Child Care Expenses (Full details required)
- Moving Expenses (Full details required)
- Allowable Business Investment Loss
- Restricted Farming Losses Carry Forward
- Capital Losses Carry Forward
- Non-Capital Losses Carry Forward
- Attendant Care Expenses
- Limited Partnership Losses of Other Years

Please use this space to provide any additional information or notes.

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