

# TAX CHECKLIST

Filling Date : Year      Month      Day  
 Tax Year :

**\*Fill out a form every year; Tax Year: January 1st - December 31st**

## PART 1A. Personal Information

Last Name					Date of Birth	Year	Month	Day	
First Name					Social Insurance Number				
Marital Status	Single	Common Law	Married	Separated	Divorced	Widowed			
Identity	Canadian citizen	PR	Other	Telephone					
Any changes in 2023 Please Specify	Marital	Birth	Death	Move	Email				
The date of change	Year	Month	Day	Mailing Adress	Unit				
Have you moved since the last filed return?	No	Yes, please select	NL		PE	Street #			
	NS    NB    ON    MB				Street Name				
	SK    AB    BC    QC				City				
	YT    NT    NU				Province				
The date of move	Year	Month	Day	Postal Code					
If you ceased to be a resident of Canada in 2023?				No	Yes, Departure date:	Year	Month	Day	
Is this your first time to file the tax?				No	<b>Yes Please provide information below</b>				
	First entry date				Year	Month	Day		
	Foreign income before first entry				\$				
	Foreign income after first entry				\$	+ Foreign tax\$			
Reminder	If applicable, please provide last year's Notice of Assessment (NOA)								

## PART 1B. Family information (Spouse and Dependents)

Please check the Box below, download and fill out relevant form								
Do you have spouse?	No	Yes	If your spouse is a non-resident, please download Tax T1 - Form 2 to fill out <b>"Family Information - non-resident spouse information"</b>					
Do you have dependants?	No	Yes	Please fill out <b>"Family Information - Dependents information"</b>					

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## PART 2A. Income (Part 1)

<b>Please check the Box below, and email the related documents to <a href="mailto:suncoastcpa@pro-accountant.ca">suncoastcpa@pro-accountant.ca</a></b>					
T4	T4A	T4(OAS)	T4E	T4RSP	T4AP
T3	T5	T5007	T5008		
Foreign Income	Please Specify				
Other Income	Please Specify				

## PART 2B. Income (Part 2)

<b>Please check the Box below, and email the related documents to <a href="mailto:suncoastcpa@pro-accountant.ca">suncoastcpa@pro-accountant.ca</a></b>	
Capital gain from sale securities, mutual funds, bonds, etc. (need details, account statement, files and receipts)	
Capital Gain - Real properties sales (need details, adjustments for sale/purchase, receipts for major renovations and improvements)	
Income from self-employment or business	Please download Tax T1 - Form 3 " <a href="#">Business Information</a> "
Rental income	Please download Tax T1 - Form 4 " <a href="#">Real Estate Rentals</a> "
Foreign Property	Please download Tax T1 - Form 5 " <a href="#">Foreign Income Verification</a> "

## PART 2C. Tax Credit (Part 3)

<b>Please check the Box below, and email the related documents to <a href="mailto:suncoastcpa@pro-accountant.ca">suncoastcpa@pro-accountant.ca</a></b>	
RRSP (Contribution receipts)	T2200 <a href="#">Please download Tax T1 - Form 6 "Business Information"</a>
Eligible educator school supply tax credit	Charitable donations
Interest paid on student loan	Childcare expenses
Medical Expenses that was not reimbursed by Insurance	Disability tax credit certificate and supporting expenses
Legal fee to collect employment income	Home renovation for seniors or persons with disabilities
Professional or union dues that was not reimbursed by employer	Capital Loss
Moving expenses due to employment or study	Working at Home Due to COVID-19 Total number of days you worked from home in 2023 <input type="text"/> Days
T2202A, TL11A, TL11B, TL11C	Others (Please provide information)

## Certification and Signature

I certify that the information given on this form is correct and complete, and fully discloses the related information.

PRINT NAME	SIGNATURE	DATE(YYYY-MM-DD)