

# TAX CHECKLIST

Filing 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 Address		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 Dependants)

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 - Dependants 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 "Business Information"
Rental income	Please download Tax T1 - Form 4 "Real Estate Rentals"
Foreign Property	Please download Tax T1 - Form 5 "Foreign Income Verification"

## 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 Please download Tax T1 - Form 6 "Business Information"
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)
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