

Personal Income Tax Return

Checklist 2023



Tax Season is upon us again! Plugged-IN CPA Accounting and Tax is pleased to invite you to have your tax return prepared by our professional staff. It is time to start pulling together all those various pieces of paper and information that we need to prepare your 2023 personal income tax return.

This checklist is to help you navigate the information we will need.

Thank you for your continued confidence in our services. We look forward to working with you in the coming weeks.

Plugged-IN CPA

Hours:

Mon - Fri

8:30 -5:00

If any of the following information has changed (or you are a new client) please provide the following information:

Name:	Spouse/Partner Name:	
Address:		
Email Address:	Phone Number:	
Self SIN:	Birthdate:	
Spouse/Partner SIN:	Birthdate:	
Marital Status at December 31, 2023:		
Dependents		
Name:	Name:	Name:
SIN:	SIN:	SIN:
Birthdate:	Birthdate:	Birthdate:

Income:	Yes No	If YES please provide:
Salary/employment income		<i>T4 slip from employer</i>
Pension/annuity income		<i>T4A/T4A(P)/T4A(OAS)</i>
Foreign pension income		<i>Country, type, currency</i>
RRSP/RRIF income		<i>T4RSP, T4RIF</i>
Dividend/investment		<i>T5/T5013</i>
Trust/mutual fund income		<i>T3</i>
Self-employed income		<i>See appendix</i>
Capital gain/losses on sale		<i>Trading income summary, realized gain/loss report and monthly/quarterly statements</i>
Other income		<i>Details or slips</i>

Other Information:	Yes No
Are you a Canadian citizen?	
Did you move to Canada during the year?	
Do you have a Canadian First Nations status certificate?	
Do you have assets outside of Canada, including foreign stocks in excess of \$10,000 Canadian?	
Do you authorize CRA to provide information about you to Elections Canada?	
Did you work from home in 2023?	
Did you sell or buy your house during the year?	
Have you had any major life changes: Marital status, children?	
Have you applied for the Disability tax credit?	
Is there more tax information which you are still waiting for?	
Do you wish to be setup with direct deposit from CRA? Attach a void cheque	

Personal Income Tax Return

Checklist 2023



Deductions and Credits

RRSP Contributions
Homebuyers or Lifelong learning plan
Union or professional dues
Child care/ summer camp for your children
Investment income expenses
First-time home buyers tax credit
Moving expenses (for job)
Employment Expenses
Adoption expenses
Student Loan interest
Tuition fees
Medical expenses

Charitable donations
Political donations
Support payments
Teacher school supplies
Tradesperson tools and/or relocation costs
Did you attend any courses or training programs during the year not reimbursed by your employer?
Did you install a HVAC system or another system to improve air quality in your home during the year?
Have you done significant renovations to your home to make it more accessible or renovate to accommodate a multigenerational home?

If YES please provide:

Tax receipts – may include first 60 days of current year
Amount of any HBP or LLP repayments
Tax receipts (if not listed on T4)
Official receipts
Interest expenses, fees etc.
Date when home was purchased
Details – must have moved at least 40km closer to work
See appendix
Attach receipts
Tax receipt
T2202A
Official receipts – contact your pharmacy or insurance provider for a summary of the year. As well. Please provide a summary of any travel over 40 KM one-way for medical purposes
Tax receipts
Tax receipts
Attach receipts
Attach receipts
Attach receipts
Attach receipts
Attach receipts
Attach receipts

If you are a new client, please provide us with your prior year tax return.

As the information in this checklist doesn't address all income tax matters and is abbreviated for simplicity, please contact one of our knowledgeable staff at 506-455-5397 for further information, details or clarification.

Thank You!