

# Personal Income Tax Return

## Checklist 2022



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 2022 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:*

<b>Name:</b>	<b>Spouse/Partner Name:</b>	
<b>Address:</b>		
<b>Email Address:</b>	<b>Phone Number:</b>	
<b>Self</b> <b>SIN:</b>	<b>Birthdate:</b>	
<b>Spouse/Partner</b> <b>SIN:</b>	<b>Birthdate:</b>	
<b>Marital Status at December 31, 2022:</b>		
<b>Dependents</b>		
<b>Name:</b>	<b>Name:</b>	<b>Name:</b>
<b>SIN:</b>	<b>SIN:</b>	<b>SIN:</b>
<b>Birthdate:</b>	<b>Birthdate:</b>	<b>Birthdate:</b>

<b>Income:</b>	Yes   No	<b>If YES please provide:</b>
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>

<b>Other Information:</b>	Yes   No
Are you a Canadian citizen?	
Do you have a Canadian First Nations status certificate?	
Do you have assets outside of Canada, including foreign stocks in excess of \$100,000 Canadian?	
Do you authorize CRA to provide information about you to Elections Canada?	
Did you work from home in 2022?	
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	

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### ***Deductions and Credits***

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

Charitable donations  
Political donations  
Support payments  
Teacher school supplies  
Tradesperson tools and/or relocation costs  
Adoption expenses

### ***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  
Total for the year  
Date when home was purchased  
Details – must have moved at least 40km closer to work  
Interest expenses, fees etc.  
See appendix  
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

***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!***