**In order to assist us in preparing your 2023 Personal Income Tax return(s) kindly complete the following:**

**Personal Information:**

Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Marital Status:**

Same as last year

Changed as of *(date):* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

New marital status *(if applicable)*:

Married  Common-law

Separated  Divorced

Widowed  Single

**Address:**  Same as last year

New *(please complete)*:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Contact Information:**

Home Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Business Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**E-file Authorization Signing**   electronic  paper

**Personal Tax Return**  electronic (PDF)  paper

**Dependant Information:**

Same as previous year

New *(please complete chart)*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Name** | **Date of Birth** | **SIN** | **Relationship** | **Net Income** | **Return to Be Prepared** |
|  |  |  |  |  | Yes  No |
|  |  |  |  |  | Yes  No |
|  |  |  |  |  | Yes  No |
|  |  |  |  |  | Yes  No |

|  |  |  |
| --- | --- | --- |
|  | Are you a Canadian Citizen? | Yes  No |
|  | If yes, do you authorize Canada Revenue Agency to give your name, address, date of birth and citizenship to Elections Canada to update the National Register of Electors? | Yes  No |
|  | Did you own foreign property at any time in 2023 with a cost of over $100,000 CDN?  *(If yes, attach details of such property)* | Yes  No |
|  |  |  |

***Continued on Reverse…***

**Please include the following information for each taxpayer:**

*(If applicable, please check box () if the information is included*)

**All income information slips**

Employment  **T4**  **T4A**

COVID-19 Support/Repayments

*(CRB, CRSB, CRCB)*  **T4A**

Partnership income  **T5013**

Pension payments from employer  **T4A**

Interest and dividends  **T5**

Mutual fund and other trusts  **T3**

Old Age Security  **T4A (OAS)**

Canada Pension Plan  **T4A (P)**

Employment Insurance  **T4E**

Income from RRSP  **T4RSP**

Income from RRIF **T4RIF**

Purchase and sale of securities  **T5008**

Social assistance, WSIB  **T5007**

Other (specify)  \_\_\_\_\_\_\_\_\_

**All official receipts:**

RRSP contributions, ***including  
 first 60 days of 2024***

Charitable donations

Political donations

Professional dues

\*\***NEW -First Home Savings**

**Account Statement**  **T4FHSA**

Disability tax credit certificate  **T2201**

Tuition and enrollment certificate  **T2202**

*If receipt is from a dependant, please have dependant sign in appropriate place on the form (reverse). If we are not completing dependant’s return, please complete the income portion of the form*

**Self-employment income and expenses** (*Include HST information, if applicable)*

**Rental property income and expenses** (*Include HST information, if applicable)*

**Details of employment expenses** *(Employees must include form T2200 signed by their employer)*

**Other items:**

**Support/alimony payments** *(Please include amount paid or received, the name, address and SIN of payee or recipient, and copy of the support agreement)*

**Child care expenses** *(Please include receipts)*

**Moving expenses** *(Please include receipts)*

**Medical expenses** *(Please include official receipts showing payment)*

**Property taxes or rent paid in the year** *(Please include the number of months at each location, the address of each location and to whom the amounts were paid))*

**Home accessibility expenses** *(For seniors and the disabled. Please contact us for more information.)*

**Multigenerational home renovation tax credit expenses** *(Please contact us for more information.)*

**Carrying charges and interest paid to earn income from investments**

**Other Credits:** *Interest paid on student loans, tradesperson’s tools expenses, &/or teaching supplies expenses (for educators only)*

**Details of disposition of stocks, bonds and mutual funds.** *(Please include investment broker monthly statements and year end summaries provided by broker)*

**Disposition of real estate including your principal residence** *(Please include proceeds of sale, sale date, and ownership. For sales of property other than a principal residence please also include purchase date and original cost)*

**Direct Deposit** *(Please include a void cheque for direct deposit if desired, unless already registered)*

**Instalment payments made during the year** *(Please include year end statement from CRA)*