



Personal Tax Checklist

New & Returning Clients

Name:			
E-Mail Address:			
<i>For returning clients, if your address has changed, please fill in your new address below:</i>			
Address:			
	Street Address	City	Prov.
Home Phone		Cell Phone	
			Work Phone
Birth Date: <small>DD/MM/YYYY</small>		Are You A Canadian Citizen?	Yes No
SIN		Marital Status:	
Dependants: <i>For returning clients, if there were any additions to your family or dependents in 2023, please list below.</i>			
Name	SIN	Birth Date	Net Income (If Applicable)
Please Identify <u>all the taxpayers</u> we will be filing for:			
Name	SIN	Birth Date	

Sale of Real-Estate

Please note that all sales of real-estate property are required to be reported to CRA on your personal income tax return, including the sale of your principal residence. Please provide the following information for each real-estate sale transaction:

Original purchase price:	\$	Sales Proceeds:	\$	Capital Additions:	\$
Date of Purchase: <small>DD/MM/YYYY</small>		Date of Sale: <small>DD/MM/YYYY</small>			
Lawyer's/Notary's statement of adjustments for the original purchase of the sale.			Details on adjustments to ACB – Major improvements, realtor's commissions.		
Was this property ever your Principal Residence?	No	If yes, which years?			
NEW Residential Property Flipping Rule: Did you own the sold property for less than 365 days?				Yes	No

Foreign Income Verification

Did you own certain property outside of Canada totaling more than \$100,000 at any time during 2023?	Yes	No
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If yes, it may be necessary for you to declare such ownership in your tax return [Form T1135 Foreign Income Verification Statement]. There are substantial penalties for non-compliance.

INCOME

Personal Income		Investment Income	
T5, T4PS – Interest and Dividends		T3, T4, T4A – Salaries and Employment Income	
T4A (P) – CPP Benefits		T5008 – Statement of Security Transactions	
T4 (OAS) – Old Age Security Benefits		Interest on prior year tax refund	
T4A – Other Pensions or Superannuation		Capital Gain/Losses (Full details)	
T4RIF – RRIF Income		T3 – Income from Mutual Funds	
T4E – Employment Insurance Benefits		Annuities	
T5007 – Social Services Benefits		Rental Income*	
T4RSP – RRSP Income		T5013 – Net Partnership Income (Loss) any Limited Partnership	
Other Employment Benefits			
T4A/ T4E - CERB			
Other Income		Business	
Alimony Received		Business Income/Expenses*	
Taxable Child Support Received		Farming/Fishing Earnings	
Scholarships/Bursaries		Professional Income/Expenses*	
Other, please explain below:		Other, please explain below:	
Non-Refundable Credit			
Married Amount – Spouse's Net Income \$			
Equivalent to Married Amount			
Disability Deductions (Full details required)			
T2202 – Tuition Fees/Education Credit			

Other Deductions	Other Information
RRSP Contributions	Installment Payments \$ _____
NEW First Home Savings Account (FHSA): Did you open a FHSA account in 2023?	Details on Foreign Property held where total cost exceeded \$100,000 CDN. -This includes foreign shares held in Canadian trading accounts
Union, Professional Dues	**New** Are you Eligible for the B.C. Renters Tax Credit? If yes, please provide a copy of your residential tenancy agreement
Spousal support payments	Please attach additional pages to provide additional information or explanatory notes:
Medical/Attendant Care Expenses	
Interest Carrying Charges on Investments	
Investment Counsel and Accounting Fees	
Employment Expenses (please include T2200 form "Declaration of Conditions of Employment")	
Childcare Expenses (Full details required)	
Moving Expenses (Full details required)	

Please note that this list was compiled to include some of the more common income, deductions, and tax credits that we see. Everyone's tax situation is unique so if you have any questions, please make additional notes, or give our office a call.

Please fill out the relevant summary sheet available on our website www.cahillcpa.ca.