

2023 PERSONAL INCOME TAX RETURN CHECKLIST



ITEMS WE WOULD LIKE TO BRING TO YOUR ATTENTION:

- Did you open a First-Time Home Savings Account (FHSA) in 2023? Please provide us with the contribution tax receipt (T4FHSA) so the amount can be deducted on your 2023 personal tax return.
- If you sold your principal residence in 2023, you must report this on your tax return. Please provide the purchase/selling dates and the selling price.
- Rental property or principal residence – did you change the use of the property in 2023? This may need to be reported on your tax return. Please let us know the details.
- Did you renovate your home to make it more accessible? If you qualify for the disability tax credit or are 65 years of age or older, the expenses may qualify for the Home Accessibility Tax Credit.
- Did you receive, sell, send or exchange any virtual currency (i.e., Bitcoin) at any time in 2023?
- Do you own foreign property with an aggregate cost that exceeded CAD\$100,000 at any time in 2023? If yes, please contact us as we will need additional information.
- Change in marital status? Please provide nature of change and effective date, and if now married or common-law, please provide their name, birthdate, and SIN
- If we are not preparing your spouse's return, provide their 2023 net income (line 23600)
- New dependents? Please provide name, relationship, date of birth, and SIN
- Province of residence on December 31, 2023 (if other than BC)



INFORMATION SLIPS

- T4 Employment
- Tips Received (No slip) _____
- T4A Pension, retirement, annuity, other
- T4A(P) CPP
- T4A(OAS) Old Age Security
- T4E Unemployment insurance received
- T5 Dividends, interest and annuities
- T3 Mutual funds & trust income
- T4FHSA Contribution to FHSA
- T4RSP Withdrawal from RRIF
- T5013 Partnership
- T5003 Statement of tax shelter information
- T10 Pension adjustment reversal (PAR)
- T2202/TL11 Tuition and enrolment certificate

RECEIPTS

- RRSP Contributions - 2023 & 1st 60 days of 2024
- Union/Professional dues
- Moving expenses (If eligible)
- Investment counsel fees
- Interest paid on investments
- Interest paid on student loans
- Childcare expenses
- Medical/attendant care expenses
- Charitable & political donations
- \$5,000.00 Home Buyer's amount (First time Home Buyers)
- BC Venture Capital Tax Credit
- Eligible educator school supply tax credit (Max. \$1,000.00)

DOCUMENTS FOR THE FOLLOWING TRANSACTIONS:

- Real estate sales or purchases
- Stocks/Bonds/mutual funds sales (T5008)
- Annual Realized capital gain/loss statements from broker
- Bitcoin or other cryptocurrency transactions
- Commodity trading
- Interest income earned but not yet received
- Sales of principal residence in 2023
- New automobile lease or purchase (If you claim automobile expenses on your tax return)

PROVIDE DETAILS OF

- Deductible employment expenses (T2200)
- Alimony/maintenance paid/received
- Adoption related expenses
- Foreign income, expenses and tax paid
- Business/professional income
- Self-employed commission income
- Capital gains/losses (Canadian & foreign)
- RRSP Home Buyer's Plan - withdrawals or repayments
- RRSP Lifelong Learning plan - withdrawals or repayments
- Disability credit (If new for 2023)
- Other: _____

INFORMATION SLIPS

- Copy of any foreign tax returns filed in 2023
- Details of income from, or distribution to, foreign entities such as foreign affiliates or trusts
- Other: _____

NOTES

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