ClarkRobinson
Chartered Professional Accountants

Personal Tax Reminder Checklist

One package per household

You can access a digital copy of this form and other worksheets at https:/www.clarkrobinson.com/

Marital Status

☐ Single	☐ Married	☐ Common-Law	☐ Divorced	☐ Separated	☐ Widowed	Date of status change

Personal Information

Taxpayer:	Email:	Phone:
Number of Days spent outside Canada:	Are you an US Citizen? Yes ☐ No ☐	If US Citizen – US SSN#:
Spouse:	Email:	Phone:
Number of Days spent outside Canada:	Are you an US Citizen? Yes ☐ No ☐	If US Citizen – US SSN#:
Address (if changed):		
City:	Province:	Postal Code:

Sold Principal Residence during tax year	Yes ☐	No ☐	Year of Original Purchase	Year of Sale
Address				Sale Price
Was the property used as principal residence for all the years it was owned (ordinarily inhabited by the taxpayer for all years owned.) Yes ☐ No ☐			If not, provide details:	
Land size if ≥ 1 Acre	Zoning if ≥ 1 Acre			

Dependants (Children, Spouse, Parents etc.)

Name	Relationship	Birthdate	SIN	Disability Amount	Income	Child Care Expenses

Did you support a parent, grandparent or other dependent in your home during the year? If so, you may qualify for a "caregiver" tax credit. Please provide information above.

Residence

Province or territory of residence on December 31:		
Did the taxpayer immigrate to Canada or emigrate from Canada during the year	Yes ☐	No ☐
If yes, provide date of entry into Canada:	Or date of departure:	

Elections Canada

Do you consent to sending your name, address, and date of birth to Elections Canada so they can confirm the information on their Register? They will not add your name to the register, only correct information already on file. This question must be answered for us to file the tax return. Please indicate below how you would like us to answer this question on your return. We will file the return with the same response as last year if we do not hear from you.

Taxpayer:
☐ I consent to sending this information
☐ I do not consent to sending this information

Spouse:
☐ I consent to sending this information
☐ I do not consent to sending this information

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Types of Income	Taxpayer	Spouse
T4 slips from employment earnings.	☐	☐
T5 slips for dividend, interest and other investment income.	☐	☐
T3 slips for dividend, interest and other investment income.	☐	☐
T4A (OAS) slip for Old Age Security payments.	☐	☐
T4A (P) slip for Canada Pension Plan benefits.	☐	☐
T4E slip for Unemployment Insurance benefits received.	☐	☐
T4RSP and/or T4RIF slips for income received from RRSPs or RIFs.	☐	☐
T5013 Income from a limited partnership. Please provide us with any slips and information received.	☐	☐
T5008 slips for sale of non-registered securities. If you sold any stocks, bonds, or mutual funds during the year you must report the sale on your return. For each security sold please list the following information: Number of units sold, description of security, year acquired, proceeds, original cost, and any selling costs. Please provide us with a realized gains and loss report for the sale of securities.	☐	☐
Tips amount: $:	☐	☐
If you worked outside of Canada or have received any income from outside of Canada, please provide this information i.e. W2 or U.S. Social Security.	☐	☐
Self-employed income. Please sort and summarize the income and expenses for your self-employed earnings. We do not require the receipts, but you must keep them for Canada Revenue Agency if they request them in the future. See separate forms: ***Self-employment income***	☐	☐
Rental income and expenses. Please sort and summarize the income and expenses for each rental property you own. We do not require the receipts, but you must keep them for Canada Revenue Agency if they request them in the future. See separate forms: ***Real Estate Rental***	☐	☐
Please provide details re the sale/disposition of all capital property (securities, real property, cryptocurrency).	☐	☐
If you received alimony or child support payments during the year, please let us know the following, provide copy of your agreement and whether the terms of your agreement changed during the year. From whom did you receive it: Amount received (alimony)$: SIN#: Amount received (child support) $:	☐	☐
Other income not described above (such as, Contractor payments, Worker's Comp.); please provide the following (attach separate list if necessary). Amount received (income details) $ Source:	☐	☐
Deductions and Credits		
RRSP contribution for Mar–Dec of last year, and contributions made in the first 60 days of this year.	☐	☐
Please provide details of any withdrawals or repayments under the RRSP First-Time Home Buyer's Plan.	☐	☐
If you had any childcare expenses please include the name of provider, amount you paid and SIN # if provider is an individual. Please provide copies of receipts and completed form: ***Child Care Expense***	☐	☐
If you made alimony or child support payments during the year, please let us know the following, provide copy of your agreement and whether the terms of your agreement changed during the year. To whom did you pay it: Amount paid (alimony) $: SIN #: Amount paid (child support) $:	☐	☐
Provide us with receipts for any union dues or professional fees paid that are not included in your T4 slip	☐	☐
Did you pay any interest on money borrowed to earn non-registered investment income? If so, please provide us with the amount of any interest paid during the year, along with supporting records.	☐	☐
Did you pay interest on eligible student loans? If so, provide us with the amount of any interest paid during the year. If you can obtain a letter from the lender which shows the interest paid this would be very helpful.	☐	☐

If you paid any fees to manage non-registered securities, please provide amount. $	☐	☐
Please summarize any deductible employment (including required form T2200) or commission expenses you incurred during the year. See separate forms: ***Employment Expenses***, ***Motor Vehicle Expenses***, and ***Home Office Expenses*** Note: You only qualify for home office expenses if you either: a) Primarily work in a home office with no other office locations OR b) Routinely meet clients at home for business purposes.	☐	☐
If you are a teacher or early childhood educator, did you have any eligible supplies expenses (Max $1,000).	☐	☐
If you made any charitable donations during the year, please provide us with the receipts. See separate form: ***Charitable Donations***	☐	☐
If you made any political donations during the year, please provide us with the receipts.	☐	☐
If you had any medical expenses during the year, please provide us with the receipts and indicate who each expense was paid on behalf of. See separate forms: ***Medical Expenses***	☐	☐
If you, your spouse, or child paid any eligible tuition fees, please provide form T2202A	☐	☐
Did you incur any eligible moving expenses without reimbursement. If so, please provide us with details.	☐	☐
Did you qualify for the Volunteer Firefighter Amount. (Search and Rescue Certificate)	☐	☐
Did you qualify for the Disability Tax Credit. (please discuss with us if you think you might be eligible)	☐	☐
Did you qualify for the First Time Homebuyer Amount.	☐	☐
Did you qualify for the BC Senior's Home Accessibility Amount.	☐	☐

Rules on Foreign Property

	Taxpayer	Spouse
Did you own or have an interest in a foreign property at any time during the year with a total ***cost*** of more than CAN$100,*000 that you used to earn investment or rental income?*	**Yes:** ☐ **No:** ☐	**Yes:** ☐ **No:** ☐
Did you transfer or loan money to a foreign trust during the year or in a previous year, or receive a loan or distribution from a foreign trust during the year or in a previous year?	**Yes:** ☐ **No:** ☐	**Yes:** ☐ **No:** ☐
Did you own or have an interest in a foreign affiliate at any time in 2023?	**Yes:** ☐ **No:** ☐	**Yes:** ☐ **No:** ☐

Should Canada Revenue Agency determine that you owned or had an interest in foreign property with a cost of more than CAN$100,000 during the year that you used to earn investment/rental income, and you have reported otherwise, penalties will be imposed. Please contact our office if you have any questions related to this requirement.

Tax Instalments

If you were required to make installment payments during the year, please provide us with a list of actual payments made or a statement from CRA showing the total amount paid.	Taxpayer $:	Spouse $:

Paper vs Electronic Signature

		Taxpayer	*Spouse*
In an effort to provide an environmentally friendly alternative to print, we are offering to send a digital copy of your return via our secure portal. For DocuSign purposes and portal registration, we require a separate email address for each individual. Should you not wish to have your copy sent this way; a paper copy will be provided for you.	*Portal via PDF*	☐	☐
	Paper Copy	☐	☐

Summary

We hope you find this checklist helpful. To help us complete your return before the April 30th deadline, please provide your information to us, along with a completed copy of this checklist, as soon as possible but no later than April 15th. In the meantime, if you have any questions regarding your return, please feel free to contact us.

Fees:

Due to inflation and increases in overhead costs, our total fees for personal tax preparation may increase. We are confident that our fees are competitive with other professional accounting firms within the marketplace.