

2023 PERSONAL INCOME TAX CHECKLIST



NAME: _____ ADDRESS: _____

Y N Each taxpayer must complete the following questions:

- 1. I agree to use email as an acceptable form of communication with JBPC for my personal tax return. Please use: _____
- 2. Would you like to register to receive online mail with CRA, if you have not already done so?
- 3. Has your address changed in the last year?
- 4. Are you a Canadian citizen?
- 5. Do you choose to provide your information to Elections Canada so that they can update their voters list?
- 6. Did you own foreign property (real estate or investment) at any time in 2023 with a total cost of more than \$100,000 CAN?
- 7. Did you dispose of any property in 2023 for which you are claiming a principal residence exemption (e.g. sold the house you live in)?
- 8. Do you, or a dependent, qualify for the disability tax credit?
- 9. What was your marital status on December 31, 2023? (Married, widowed, divorced, separated, common-law, or single) _____
If your marital status changed during the tax year, please provide date of change: _____
- 10. If you have new dependent children, please list their name, date of birth and gender: _____
- 11. **GUIDELINE FOR DOCUMENTS TO PROVIDE** - check all that apply:
 - All "T-Slips" (T4, T5, T3, T4A, T5008, etc.)
 - Medical expenses (ask your pharmacist for your 2023 prescription list)
 - Charitable donations
 - RRSP contributions
 - T2202 tuition slip / Interest on student loans
 - Union dues
 - Political contributions
 - First time home buyer
 - Childcare expenses
 - Support payments (made/received)
 - Self-employment income
 - Employment expenses (need a signed T2200 form from your employer)
 - Rental income
 - Request for printed copy of tax return if desired (\$20 fee)