

Personal Income Tax Checklist 2022 Taxation year

PERSONAL INFORMATION (If we prepared your 2021 return, please complete ONLY if there is a change)

Taxpayer Name: _____ Spouse Name: _____
 SIN: _____ SIN: _____
 Date of Birth: (DD/MM/YYYY) _____ Date of Birth: (DD/MM/YYYY) _____
 Phone (home): _____
 Phone (Other): _____
 Emails(s): _____
 Marital Status: ☐ Married ☐ Single ☐ Common-law ☐ Separated ☐ Divorced ☐ Widowed
 If marital status changed during the year, provide date of change (DD-MM-YY) _____ nature of change _____
 Did the marital status change made you move out from your Principal Residence (PR)? Yes ☐ No ☐

DEPENDANTS (If we prepared your 2021 return, please complete ONLY if there is a change)

Name	Date of Birth (DD/MM/YYYY)	SIN	Relationship

RESIDENCE (If we prepared your 2021 return, please complete ONLY if there is a change)

Province or territory of residence on December 31, 2022 _____

FOREIGN REPORTING (PENALTIES APPLICABLE if not reported)

- Do you own/hold foreign Property / assets at any point of time in 2022 or before outside your RRSP (other than personal use assets such as cash, stocks, digital currency like Bitcoin, real estate) with a cost of: more than CDN \$250,000? ☐ Yes ☐ No
- Or
- Between CDN \$100,000 and CDN \$250,000 ☐ Yes ☐ No
- Foreign affiliates (controlled or non-controlled) ☐ Yes ☐ No
- Please provide details of ownership of foreign assets and transactions with foreign entities
- Did you inherit any property/money or any kind of asset which is worth \$100,000 at any point of time in 2022? ☐ Yes ☐ No

HOME/ PRINCIPAL RESIDENCE (Buy or Sell)

- Did you dispose of or sell your principal residence during the year? If Yes, Provide details of and/or documents for purchase and sale. ☐ Yes ☐ No
- Did you rent a significant portion of your principal residence? ☐ Yes ☐ No
- Have you moved out of your principal residence because a significant portion of the property was damaged by fire? ☐ Yes ☐ No
- Did you change your principal residence into a rental property? ☐ Yes ☐ No
- Did you buy a Principal Residence? ☐ Yes ☐ No

INCOME

- T4 slips - Employment income (including stock option benefits)? ☐ Yes ☐ No
- T4A - Commission and self-employment (including directors fees, scholarships, bursaries)? ☐ Yes ☐ No
- T4E - Employment insurance? ☐ Yes ☐ No
- T5007 - Social Assistance or Workers' Compensation ☐ Yes ☐ No

*We do e-filing for quicker refund, where applicable
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• Income not included on T4 (tips, gratuities, and occasional earnings etc.)? \$ _____	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
• T4A - Pension, retirement, and annuity income?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
• T4A(OAS) - Old age security?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
• T4RSP - Registered retirement savings plan income (including withdrawals)?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
• T4AP - Canada pension?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
• T4A(RCA) - Retirement compensation arrangements?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
• T4RIF - Registered retirement income fund income?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
• Foreign pension income? Attach details of amounts received?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
• Other Foreign Income	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
• T3 - Income from trust allocations?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
• T5 - Investment Income (dividends, interest, including interest earned but not yet received, for example, Canada Savings Bonds)	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
• T4PS - Income from profit sharing plans?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
• T5013/T5013A - Partnership income?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
• T5008 - Income from Securities transactions?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
• Other investment income, for example labour sponsored funds? Please provide details	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
• Shares acquired and/or disposed of through exercise of stock options?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
• Did you dispose of property during the year (publicly traded shares, bonds, real estate, etc.)?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
• Any Support payments received? (Spousal support and/or child support)	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
• RRSP Withdrawal: Income or Home buyers plan or Lifelong learning?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No

OTHER INCOME – Details of any of the below income where no T slips may have been received:

- Other employment income (including stock options and Election Form T1212)
- Rental Income
- Alimony, separation allowances or child maintenance
- Pension income from foreign source and the type of pension.

DEDUCTIONS

• Disability support deduction?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
• Childcare expenses? Please provide receipts for each child	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
• Professional or Union dues paid? (Not included on T4) \$ _____				
• Any Support payments made? (Spousal support and/or child support)	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
• Moving expenses? Please provide details with all receipt	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
• Interest cost on funds borrowed to earn investment \$ _____				
• Investment management fees \$ _____				
• Accounting/ Legal fees \$ _____				
• T2200S: Covid – 19 Work from Home Expenses. (This form is only for employees who worked from their home in 2022 due to COVID-19)	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
If you choose the flat method, how many days did you work from home in 2022? _____ days				
• CERB/CRB Repayments – support for any CERB/CRB amounts repaid during 2022	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
• Northern residents' deduction in a prescribed area	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
• Clergy resident deductions.	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No

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TAX CREDITS

• Home accessibility Tax credit (65+ and/or disabled) (Increased from \$10,000 to \$20,000 for 2022)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Did you incur any adoption related expenses?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Are you eligible for disability tax credit?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Charitable Donations? Attach receipt.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
- Donation of cultural property		
- <i>Donation of ecologically sensitive land</i>		
- <i>Gifts to foreign Charitable Foundations</i>		
• Political Donations? Attach receipt.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Tuition fees for yourself? (Form T2202 TL11A, B, C and D where applicable)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Tuition fees for your dependent(s)? (Form T2202 signed by student)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Interest on student loans? Attach receipt	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Trade or professional examination or other professional dues? Attach receipt	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Did you complete a minimum of 200 hours of volunteer fire-fighting services in the year, which includes responding to calls, being on call, attending meetings and training related to prevention and suppression of fire?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Do you or dependents have prolonged mental & physical impairment or life-sustaining therapy) (Vision, memory, speech, Type 1 Diabetes Kidney Disease etc.)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Employment expenses (Form T2200 signed by employer), including tools?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Medical expenses (including travel insurance, Gluten-free products, medical marihuana and cannabis products for medical purposes etc.)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Canada Caregiver Credit	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Caregiver Training courses	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• First-time home buyer tax credit (From \$5,000 to \$10,000 in 2022) NEW!	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Eligible educator school supply tax credit? Claim up to \$1,000 for eligible teaching supplies	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Canada Training Credit? (Must have eligible tuition fees)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Air quality improvement tax credit NEW!	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Upgrade of mechanical heating, ventilation, and air conditioning (HVAC) systems		
• Labour mobility deduction NEW!	<input type="checkbox"/> Yes	<input type="checkbox"/> No

OTHER CREDITS

• Pension Adjustment Reversals (T10 slip)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Film and Video production eligible for tax credit?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Flow-through share expenses (A 30% tax credit on agreement entered after April 7, 2022) NEW!	<input type="checkbox"/> Yes	<input type="checkbox"/> No

SUB – CONTRACTOR/ PROPRIETORSHIP/ SELF – EMPLOYED

Please fill the income and expense checklist (Refer to the website for one)

• Financial statements or summary details for business/rental investments attached?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Details of income and expense items attached?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Details (including dates) of acquisition and disposals of fixed assets attached?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Do you use your vehicle for business? Provide expenses; both business and total kilometers	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Do you use a portion of your home for business?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Provide expenses; both workspace and total square footage of home and space used for business	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Do you have a payroll account?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Do you have a PST account?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Have you registered to be eligible for Employment Insurance special benefits?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

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RENTAL PROPERTIES

Please fill the Rental income and expense checklist (Refer to the website for one)

- Do you have a GST account? ☐ Yes ☐ No
- If first year of rental, please provide details of the property.
- If you are renting the property on short term basis like Air BNB, VRBO then we should talk

RRSP CONTRIBUTIONS

- Did you make any RRSP contributions? Attach receipts (including those in the First 60 days of 2023) ☐ Yes ☐ No

PRIOR YEAR TAX RETURN INFORMATION/CORRESPONDENCE

- Notice of (RE)Assessment for 2021 year including RRSP contribution limit? ☐ Yes ☐ No
- Notice of (RE)Assessment(s) for any other year if not already provided to us? ☐ Yes ☐ No
- **2022 Income tax instalments paid for the year?** ☐ Yes ☐ No
- Direct Deposit - is your information current? If changed, provide a VOID cheque ☐ Yes ☐ No

QUESTIONS (If you don't answer the following, we will assume it as yes)

- Do you agree to CRA providing your name, address, and date of birth to election Canada? ☐ Yes ☐ No
- Are you a Canadian Citizen? ☐ Yes ☐ No
- If no, are you a permanent resident? ☐ Yes ☐ No

PERSONAL PREFERENCES

- Format desired for the final copy of your personal income tax return(s) ☐ Paper ☐ Email
- If paper copy requested, indicate if you would like spouses return and family members packaged separately ☐ Separately ☐ Together
- Do you wish to register you email with Canada Revenue Agency ("CRA")?
(By providing your email, you understand that you are registering for online mail and accept the terms and conditions that are set out by CRA) ☐ Yes ☐ No

If yes, please provide the email address _____
 ✓ By giving an email address, I am registering to receive email notifications from the CRA and agreeing to the terms of use with CRA.

NEW AND IMPORTANT ITEMS !!!

- ✚ **Underused Housing Tax (UHT)** – The UHT imposes a national annual 1% tax on the ownership of vacant or underused housing in Canada that took effect on January 1, 2022. The tax usually applies to non-resident, non-Canadian owners. In some situations, however, it also applies to Canadian owners. Legal ownership of real estate must be considered as of December 31, 2022, with filings and/or taxes first being due on April 30, 2023. – see the website for more details.
- ✚ **Type 1 Diabetes** – Individuals with type 1 diabetes will be effectively deemed eligible for the disability tax credit. While this change was legislated in 2022, it is retroactive to 2021 and subsequent years.
- ✚ As of 2022, certain costs reimbursed to **surrogate mothers** and for fertility, are eligible medical expenses.
- ✚ **Canada Dental Benefit** – The Canada dental benefit provides an up-front, tax-free payment to cover dental expenses for children under the age of 12 without dental coverage. The benefit is only available to families whose adjusted family net income is under \$90,000. Applications for this benefit can be made online on CRA's My Account
- ✚ **My CRA mobile App** – This web app allows you to access and view key portions of your tax information such as your notice of assessment, tax return status, benefit, and credit information, and RRSP and TFSA contribution room.
- ✚ **Property Ownership** – If you are a co-owner of a property, you have to determine if a partnership exists or not.

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FILING & PAYMENT DUE DATES FOR 2022 TAXES

May 1, 2023	Deadline to file your taxes.
Jun 15, 2023	Deadline to file your taxes if you or your spouse or common-law partner are self-employed.
May 1, 2023	Deadline to pay your taxes.
March 31, 2023	GST if you have commercial property.
Jun 15, 2023	Deadline to file annual GST return.
May 1, 2023	Deadline to pay your GST.

Our office address is:

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