

PERSONAL INCOME TAX RETURN CHECKLIST 2023



Please supply us with the following items if they are applicable to your personal income tax return.

SLIPS

- Employment income** T4
- All other income information slips** T3, T4A, T4PS, T5, T5013, T5018
- Canada Pension Plan (CPP)** T4A-P
- Social assistance, income assistance, or workers' compensation benefits** T5007
- Other pensions and annuities** T4A, T4RIF, T4RSP
- Employment Insurance benefits (EI)** T4E
- Old Age Security** T4A(OAS)

OTHER INCOME

- Other employment income not reported on slips** including tips
- Partnership income and expenses**
- Capital gains and losses realized** include annual trading summary and T5008
- Self-employment income** business, professional, commission, or farming income and business expenses
- Rental income and expenses**
- Scholarships, fellowships, and bursaries** T4A
- Alimony, spousal allowances, or child maintenance** if taxable by court order

FOREIGN INCOME AND PROPERTY

- Foreign income**
- Foreign pensions**
- Details of foreign property owned at any time** including cash, stocks, trusts, partnerships, real estate, etc. over CAD\$100,000 (excluding personal-use property)

DEDUCTIONS

- Employment related expenses** T2200, T2200s
- Moving expenses** including costs of maintaining a vacant former residence
- Interest on money borrowed to purchase investments or investment counsel fees**
- Digital news subscription expenses**
- Professional or union dues that are not reported on a T4**
- Registered Retirement Savings Plan (RRSP)** contributions including January and February 2024
- Alimony, spousal allowances or child maintenance** only if deductible by court order

TAX CREDITS

- Tuition fees for you or a dependant** T2202, TL11A, TL11D
- Charitable donations and political contributions**
- Volunteer Firefighter Tax Credit**
- Medical expenses for you or a family member** your medical providers may be able to provide annual statements upon request
- Teacher or Early Childhood Educator Tax Credit**
- Interest paid on qualifying student loans**
- New Home Buyers' Tax Credit**

RRSP PLANS

- Home Buyers' Plan withdrawal or repayment**
- Lifelong Learning Plan repayment**

DEPENDANTS

- Child care expenses**
- Adoption expenses**

QUESTIONS? Contact one of our local offices or visit our website at availcpa.com

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