

Sutherland Watt CPAs Inc.
Personal Tax Checklist for Taxation Year 2023

Please complete the checklist below and return to us with your tax information

Part A - Personal Information (complete Part A **ONLY** if there is a change from the prior year)

Name and Social Insurance Number:	Spouse name and Social Insurance Number:
Date of Birth:	Date of Birth:
Email:	Email:
Address:	Telephone: Home: Office:
Email for all other individuals we will be filing a tax return for:	Spouse's net income \$ _____ (required if we do not prepare their tax return)

Children	SIN	Date of Birth
_____	_____	_____
_____	_____	_____

Part B – General – All clients to complete this section - mandatory

- | | | |
|---|-----|----|
| 1) Did you purchase your first home in 2023? | Yes | No |
| 2) Are you and/or your spouse a US Citizen or green card holder? | Yes | No |
| 3) Did your marital status change in 2023? | Yes | No |
| If yes, please provide a date that the status changed _____ | | |
| 4) At any time in the year, did you own foreign property, including US securities, costing more than \$100,000? | Yes | No |
| 5) Did you sell your permanent home or cottage in 2023? | Yes | No |
| 6) Do you have a disability that might be eligible for the Disability Tax Credit? | Yes | No |
| If yes, have you applied for the Disability Tax Credit? Yes No | | |

Part C – Income (provide slips, documents or details)

<i>Canadian and Foreign Sources of Income (provide slips, documents or details)</i>	
Employment (T4)	Capital Gains (Provide capital gains summary from investment advisor)
Business/professional income/expenses	
Rental income/expenses	2021 Notice of Assessment (or reassessment)
Support payments received	Mutual Funds/estates/trusts (T3)
Employment Insurance (T4E)	Partnerships/tax shelters (T5013/T101)
CPP/QPP/OAS/{T4A(P)/T4A(OAS)}	Pension/retiring allowance (T4A)
RRSP/DPSP, RPP, RRIF (T4RSP/T4RIF)	
Dividends (T5)	Other sources of income: _____
Interest (T5/T600)	

Note: Through the matching program of tax information slips, the CRA is imposing harsh penalties for unreported income. Please provide us with any late or amended tax slips (i.e. slips received after sending package to Sutherland Watt) to avoid exposure to penalties.

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Part D – Expenses and Tax Credits

<i>Deductions and Credits (provide receipts, documents or details)</i>	
RRSP/ FHSA contributions	Tuition fees (T2202 or T2202A)
Union/professional membership dues	Interest paid on student loans
Child care expenses	Charitable donations
Moving expenses	Medical/disability supports/attendant care expenses
Support payments made	Adoption expenses
Legal and investment counsel fees	Political contributions
Interest paid on investments	Income tax instalments & any foreign taxes paid
Deductible employment expenses	Home accessibility expenses for individuals with a disability
Children’s Sports and Arts Tax Credit expenses (for children 19 or younger in 2023)	
Digital news subscription expenses	Other expenses/tax credit amounts:

Part E – SELF-EMPLOYED INDIVIDUALS AND EMPLOYEES WITH A SIGNED T2200 (do not complete if your business is incorporated)

If you are an employee, please only complete the following if your employer provided a T2200 for home office or automobile expense deductibility. All Self-employed individuals please complete relevant sections below.

Business Number _____

Office in Home Expenses

Area of home used for business _____

Total area of home _____

Heat _____

Insurance _____

Mortgage Interest _____

Electricity _____

Maintenance _____

Property taxes _____

Automobile Expenses

Kilometers driven in the tax year to earn business income _____

Total kilometers driven in the tax year _____

Fuel and oil _____

Insurance _____

Maintenance and repairs _____

Interest _____

License and registration _____

Lease cost _____