

## 2022 Personal Tax Checklist

### Taxpayer 1

Name \_\_\_\_\_

### Taxpayer 2

Name \_\_\_\_\_

- 1 Did you change your address during the year? Y N  
2 Did you change your marital status in 2022? Y N

New Address \_\_\_\_\_  
Please specify \_\_\_\_\_

	Yes	No	Yes	No
3 Did you have any new dependant? If yes, Please <b>click Appendix 1</b> to fill out information.				
4 Are you a U.S. citizen, Green Card Holder or were you or your parents born in the US? You may have U.S. filing obligations				
5 <b>NEW!</b> If you were not a Canadian citizen or a permanent resident, was your name on the legal title of a residential property located in Canada on December 31, 2022? If yes, please <b>click Appendix 2</b> to fill out information for Underused Housing Tax (UHT)				
6 <b>NEW!</b> Are you a shareholder of a Canadian corporation that owns residential property on December 31, 2022? If yes, the corporation may need to file Underused Housing Tax, please <b>click Appendix 2</b> to fill out information for Underused Housing Tax (UHT)				
7 Are you an indigenous person? Special tax rules may apply.				
8 Did you sell your principal residence during the year? If yes, Please <b>click Appendix 3 Part A</b> to fill out information.				
9 Did you change the use of any real estate property during the year? I.e. a principal residence into a rental property or vice versa? If yes, Please <b>click Appendix 3 Part C</b> to fill out information.				
10 Did you have any foreign property at any time during the year with a combined cost of more than \$100,000 CDN? E.g. Funds held outside of Canada, foreign stocks, real estate outside of Canada (other than personal use), property held in an account with a Canadian registered securities dealer. If yes, Please <b>click Appendix 4</b> to fill out information.				

### Income: did you earn the following income

- |  |  |  |  |  |
|--|--|--|--|--|
| 11 <b>Please provide all information slips:</b> T3, T4, T4A, T4A(OAS), T4A(P), T4E, T4PS, T4RIF, T4RSP, T5, T5003, T5007, T5008, T5013, and T5018  |  |  |  |  |
| 12 <b>Rental income</b> including long-term rental and Airbnb/VRBO. Please <b>click Appendix 5</b> to fill out information.  |  |  |  |  |
| 13 <b>New rental business:</b> if you purchased a new rental property in 2022, please provide purchase agreement.  |  |  |  |  |
| 14 <b>Business or professional or partnership income:</b> including all sole-proprietorship business and shared economy (eg. Uber) or internet based payments(eg.Youtuber, etc). Please <b>click Appendix 6</b> to fill out information. |  |  |  |  |
| 15 <b>Capital gain(loss) from sale of real estate:</b> sold a real estate property that is not your principal residence in 2022? Please <b>click Appendix 3 Part B</b> to fill out information.  |  |  |  |  |

16	<b>Capital gain(loss) from sale of non-registered investments or cryptocurrency:</b> please provide trading summary from your broker and T5008 slips			
17	<b>Other income:</b> pensions, alimony, spousal or child support, scholarships, fellowship and bursaries			
18	<b>Other employment income:</b> any severance or termination pay, retiring allowance, tips or gratuities			
19	<b>Other Income that is earned but not yet received:</b> Canada saving bonds, deferred annuities, term deposits,etc			
<b>Deduction and tax credits: did you have the following deductions and credits?</b>				
20	<b>RRSP contributions:</b> including the contribution made during the first 60 days of 2023.			
21	<b>Home Office:</b> required to work from home due to COVID-19. Please <b>click Appendix 7</b> to fill out information.			
22	<b>Employment Expense:</b> T2200 needs to be signed by your employer, please provide receipts.			
23	<b>Professional or union dues:</b> please provide receipts			
24	<b>Moving:</b> moved 40KM closer to your work or school and didn't get reimbursed from your employer. Please click <b>Appendix 8</b> to fill out information.			
25	<b>Interest and advisory fee on investment:</b> paid related to non-registered investment accounts. Please provide dollar amount.			
26	<b>Charitable donations:</b> to registered charities and political contribution. Please provide receipts.			
27	<b>First-time Home Buyer Credit:</b> doesn't own a home for the last 4 years, and purchased a home in 2022.			
28	<b>Childcare expenses: including day camps and noon supervision</b> .provide receipts and if the services are provided by an individual, their SIN should be on the receipt			
29	<b>Tuition fee:</b> for both full-time and part-time courses, please provide T2202 form or T11L(overseas post secondary school)			
30	<b>Medical expenses:</b> including personal health plan premiums paid for you, your spouse and any dependent persons. Please provide receipts			
31	<b>NEW! Fertility related expense:</b> costs incurred to access medical intervention required to conceive a child? Please provide receipts			
32	<b>Disability tax credit:</b> please provide T2201, Disability Tax Credit Certificate. <b>NEW!</b> Individuals with type 1 diabetes will be deemed eligible for Disability Tax Credit, it's retroactive to 2021.			
33	<b>Disability supports expenses:</b> including speech, sight, hearing and attendant care expenses. Please provide receipts			
34	<b>Eligible dependent:</b> You were single or separated, supporting a dependant, and not paying child support.			

<p><b>35 Caregiver amount:</b> if you provided in-home care for an infirm dependent relative</p>			
<p><b>Home Accessibility Amount:</b> renovated your home in 2022 to make it more accessibility for  <b>36</b> the an individual who is either, eligible for the Disability Tax Credit or over 65 years of age.  Please provide receipts</p>			
<p><b>37 Other Payments:</b> Alimony and spousal support</p>			
<p><b>38 Adoption expenses.</b> Please provide receipts</p>			
<p><b>39 Student loan Interest:</b> Only qualifying student loan is eligible. Please provide dollar amount.</p>			
<p><b>40 Eligible School Supplies:</b> only for teacher and please provide receipts for up to \$1,000.</p>			
<p><b>41 Northern Tax Credits:</b> lived in specified northern area in 2022.</p>			
<p><b>42 Film and video production expenditures:</b> eligible for a tax credit, please provide receipts</p>			
<p><b>43 Digital news subscription tax credit:</b> please provide receipts</p>			
<p><b>NEW! Air Quality Improvement for Business Owners:</b> purchase or upgrade of mechanical  <b>44</b> heating ventilation and air conditional system to improve air quality from Sept. 1, 2021 to Dec.  31, 2022? Please provide receipts.</p>			