

phone: 604-983-6632 web: www.jkctax.com

	Personal Ta	x Checklis	t 'a	ix real		
Name:						
E-mail Address:						
If your address has changed, plea	se fill in your new address bel	ow:				
Address:						
	Street Address	City	P	rov.	Postal Code	
Phone:		Cell:				
Birth date:	Are you a Cana	dian Citizen:	Yes (	or	No	
SIN:	Marital Status:					
Minor, Infirm, or Elderly	Dependents Information	<u>on</u>				
Name S.I.N			Birth date	l	Net Income	
	-					
	INCOR					
5 11	INCOM					
Personal Income	'	Investment Income				
T4, T4A- Salaries and Emp		T3, T5, T4PS- Interest and Dividends				
T4A (P)- CPP Benefits		T5008- Statement of Security Transactions				
T4 (OAS)- Old Age Securit		Interest on prior year tax refund				
T4A- Other Pensions or S	•	Capital Gain/Losses (Full details)				
T4RIF - RRIF Income	T3- Income from Mutual Funds					
T4E - Employment Insura	Annuities					
T5007 - Social Services Be		Rental Income*				
T4RSP - RRSP Income	T5013 - N	T5013 - Net Partnership Income				
Other Employment Benef	(Loss) an	(Loss) any Limited Partnership				
T4A/ T4E - CERB						
	Sale of Rea	l-Estate				
Please note tha	t all sales of real-estate proper	rty are required to	be reported to	CRA on		
	ne tax return, including the sa			ase provi	ide	
	g information for each real-est					
Original purchase price:	\$ Sales proceed: \$	Capi	tai additions: \$			
	Foreign Income	Verification				
Did you own certain pro	perty outside of Canada totali	ng more than \$10	0,000 at any tin	ne during	; 2022?	
	Yes	No				
If yes, it ma	y be necessary for you to decla	are such ownershi	p in your tax re	turn		

[Form T1135 Foreign Income Verification Statement] There are substantial penalties for non-compliance.



**Other Income** 

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Alimon	Alimony Received		Business Income/Expenses*		
·			• •		
Taxable Child Support Received			Farming/Fishing Earnings		
Scholar	rships/Bursaries	5	Professional Income/Expenses*		
Other (please explain below)			Other (please explain below)		
Non-Refundable Credit			Other Deductions		
Married Amount - Spouse's			RRSP Contributions		
Net Income\$			Union, Professional Dues		
Equivalent to Married Amount			Spousal support payments		
Disability Deductions (Full details required)			Medical/Attendant Care Expenses		
T2202 - Tuition Fees/Education Credit			Interest Carrying Charges on		
Interest Paid on Student Loans			Investments		
Medical Receipts			<b>Investment Counsel and Accounting Fees</b>		
Charitable Donations			Employment Expenses * (please include		
Political Contributions			T2200 form "Declaration of Conditions of Employment")		
OTHER INFORMATION			Child Care Expenses (Full details required)		
Installm	Installment Payments \$		Moving Expenses (Full details required)		
exceede		erty held where total cost his includes foreign shares ng accounts			
Did you we	ork more thar		ome for a period of at least four consecutive in 2022		
Yes					
Please Identify all of the taxpayers we will be filing for:					

**Business** 

Please attach additional pages to provide additional information or explanatory notes.

Please note that this list was compiled to include some of the more common income, deductions and tax credits that we see. Everyone's tax situation is unique so if you have any questions please make additional notes or email our office