

## Personal Tax Checklist

Tax Year

Name: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

If your address has changed, please fill in your new address below:

 Address: \_\_\_\_\_  
   Street Address  City  Prov.  Postal Code

Phone: \_\_\_\_\_ Cell: \_\_\_\_\_

 Birth date: \_\_\_\_\_ Are you a Canadian Citizen: Yes  or No 

SIN: \_\_\_\_\_ Marital Status: \_\_\_\_\_

### Minor, Infirm, or Elderly Dependents Information

Name	S.I.N	Birth date	Net Income
_____	_____	_____	_____
_____	_____	_____	_____

### INCOME

#### Personal Income

- T4, T4A- Salaries and Employment Income
- T4A (P)- CPP Benefits
- T4 (OAS)- Old Age Security Benefits
- T4A- Other Pensions or Superannuation
- T4RIF - RRIF Income
- T4E - Employment Insurance Benefits
- T5007 - Social Services Benefits
- T4RSP - RRSP Income
- Other Employment Benefits
- T4A/ T4E - CERB

#### Investment Income

- T3, TS, T4PS- Interest and Dividends
- T5008- Statement of Security Transactions
- Interest on prior year tax refund
- Capital Gain/Losses (Full details)
- T3- Income from Mutual Funds
- Annuities
- Rental Income\*
- T5013 - Net Partnership Income
- (Loss) any Limited Partnership

#### Sale of Real Estate

Please note that all sales of real estate property are required to be reported to CRA on your personal income tax return, including the sale of your principal residence. Please provide

the following information for each real estate sale transaction:

Original purchase price: \$ \_\_\_\_\_ Sales proceed: \$ \_\_\_\_\_ Capital additions: \$ \_\_\_\_\_

#### Foreign Income Verification

Did you own certain property outside of Canada totaling more than \$100,000 at any time during 2022?

 Yes  No 

If yes, it may be necessary for you to declare such ownership in your tax return [Form T1135 Foreign Income Verification Statement]

There are substantial penalties for non compliance.

**Other Income**

- Alimony Received
- Taxable Child Support Received
- Scholarships/Bursaries
- Other (please explain below)

**Business**

- Business Income/Expenses\*
- Farming/Fishing Earnings
- Professional Income/Expenses\*
- Other (please explain below)

**Non-Refundable Credit**

- Married Amount - Spouse's
- Net Income\$-----
- Equivalent to Married Amount
- Disability Deductions (Full details required)
- T2202 - Tuition Fees/Education Credit
- Interest Paid on Student Loans
- Medical Receipts
- Charitable Donations
- Political Contributions

**Other Deductions**

- RRSP Contributions
- Union, Professional Dues
- Spousal support payments
- Medical/Attendant Care Expenses
- Interest Carrying Charges on Investments
- Investment Counsel and Accounting Fees
- Employment Expenses \* (please include T2200 form "Declaration of Conditions of Employment")
- Child Care Expenses (Full details required)
- Moving Expenses (Full details required)

**OTHER INFORMATION**

- Installment Payments \$ \_\_\_\_\_
- Details of Foreign Property held where total cost exceeded \$100,000 - This includes foreign shares held in Canadian trading accounts

**Did you work more than 50% of the time from home for a period of at least four consecutive weeks in 2023?**

- Yes     No

If yes, how many days at home \_\_\_\_\_

\*Provide signed T2200S signed by your employer.

**Please Identify all of the taxpayers we will be filing for.**

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**BC Renter's Tax Credit Declaration**

low and moderate-income renter individuals and families with an adjusted income of \$60 000 or less  
Individuals and families with an adjusted income greater than \$60 000 and less than \$80 000

Rental address: \_\_\_\_\_

Rent paid at the address: \_\_\_\_\_ Number of months of tenancy at this address: \_\_\_\_\_  
e all

Name of landlord or company to whom payment was made: \_\_\_\_\_

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. Please fill out the relevant summary sheet available on our website, jkctax.com