

2023 TAX CHECKLIST

We want to make sure you get every tax credit and deduction that you're entitled to, so we are providing you with this handy checklist.

*****ALL house & property sales must now be reported on your tax return*****

SLIPS

- T4 slips (Employment income)
- Employment insurance benefits (T4E)
- Interest, dividends, mutual funds (T3, T5, T5008)
- Tuition/education receipts (T2202A)
- Old Age Security & CPP benefits (T4A-OAS/T4AP)
- Other pensions and annuities (T4A)
- First Home Savings Account (T4FHSA)
- Social Assistance payments (T5007)
- Workers' compensation benefits (T5007)
- CWB Advance Payments (RC210)
- All other information slips

RECEIPTS

- RRSP contribution receipts
- Spousal or child support
- Professional or union dues
- Tool expenses (Tradespersons & apprentice mechanics)
- Medical expenses
- Charitable/Political donations
- Child care expenses
- Adoption expenses
- Moving expenses

RECEIPTS (continued)

- Carrying charges and interest expenses
- Interest paid on student loans
- Exams for professional certification

OTHER DOCUMENTATION

- Address/phone number change
- Marital Status Change
- Notice of Assessment/Reassessment (new clients)
- Sale or deemed sale of real estate, stocks, or bonds
- Northern residents deduction receipts
- Rental income and expenses
- Business, farm or fishing income and expenses
- Automobile/travel logbook and expenses
- Disability Tax Credit or Caregiver Amount
- Volunteer Firefighters certification
- Search and Rescue volunteers certification
- Custody Arrangement documentation
- Red Seal
- First time Homebuyers
- Rent Credit details

We hope you find this helpful
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