

PERSONAL TAX CHECKLIST 2023

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Name: _____
Address: _____

E-mail: _____

Tel. No: _____
S.I.N: _____
Birthdate: _____
Marital Status: _____
Spouses Name: _____
Spouses S.I.N: _____
Spouses Birthdate: _____

DEDUCTIONS/CREDITS

DID YOU SELL YOUR PRINCIPAL RESIDENCE DURING THE YEAR? _____
if so, provide the statement of adjustments for the sale and purchase
Do you have any bare trust relationships that need to be reported on a T3 trust return? _____
(Please review our tax letter to see if this applies)
Employment expenses Form T2200 must be completed by your employer (see back page) _____
Digital news subscription amounts paid _____
Commission expenses (e.g. automobile, promotion and entertainment, travel, supplies, samples, home office) – enter on next page _____
RRSP contributions: \$ _____ (attach receipts) _____
Lump sum transfer to RRSP _____
Withdrew RRSP funds to purchase a qualifying home or education expenses: \$ _____ Date: _____ (provide full details) _____
First time homebuyer during 2023? (provide statement of adjustments) _____
FHSA contribution: \$ _____
Union or professional dues (attach receipts) _____
Alimony or maintenance (provide name, address, S.I.N # and amount paid) _____
Moving expenses (provide full details and receipts) _____
Child care expenses (provide name, address, S.I.N # and amount paid) _____
Tuition fees for yourself and/or your dependents (attach receipts) _____
BC Seniors Home renovation expenses _____
Federal and Provincial political contributions _____
Carrying charges in respect of investment income _____
Tax shelter purchases (attach T5013 / T101) _____
Disability credit (disability credit certificate required in current or prior years) _____
Student loan interest expense _____
Unreimbursed medical and attendant care expenses for self or other dependents _____
Charitable donations (attach receipts) _____
Accounting fees paid for tax planning or related to investments _____
Did you rent? - BC renters tax credit _____
(provide landlords name, address, period of rental and rent paid)
Other deductions _____

ADDITIONAL COMMENTS, MISSING INFORMATION AND NOTABLE CHANGES FROM 2022

BUSINESS INCOME AND EXPENSES**EMPLOYEE AND COMMISSION EXPENSES**

Name of business: _____

Address: _____

For the period: _____ to _____

Are you registered for and do you charge GST/HST? _____ Yes _____ No

REVENUE \$ _____**(Please see ** below)****EXPENSES****BUSINESS****EMPLOYEE & COMMISSION**

Cost of goods sold \$ _____ \$ _____

Advertising and Promotion _____

Bad debts _____

Bank charges and interest _____

Business license, tax and dues _____

Courier and delivery _____

Insurance _____

Meals and entertainment _____

Management and administration fees _____

Office (supplies, postage, etc.) _____

Rent and property taxes, (excl. home office) _____

Supplies _____

Telephone (line, cell, fax) _____

Travel _____

Wages and benefits _____

Utilities (exclude home office) _____

Others _____

Automobile See Auto Expense on next page See Auto Expense on next page

Home office See Home Office on next page See Home Office on next page

**** If you are registered for GST/HST, the revenue should exclude GST/HST collected, and the expenses should exclude the input tax credit amount.****FIXED ASSETS PURCHASED DURING THE YEAR**

Amount

Equipment	\$ _____	\$ _____
Furniture and fixture	_____	_____
Computers - hardware	_____	_____
Computers - software	_____	_____
Others _____	_____	_____

AUTOMOBILE EXPENSES FOR THE YEAR

HOME OFFICE EXPENSES FOR THE YEAR

Gas _____
 Insurance _____
 Repairs and maintenance _____
 Parking _____
 Car wash _____
 License and registration _____
 Interest on financing _____
 Lease payments _____
 Value of Automobile _____
 Purchase of Automobile _____
 during the year _____
 No. of km - Business _____
 No. of km - Total _____

Rent _____
 Mortgage interest _____
 Property taxes _____
 Maintenance/strata fee _____
 Repairs and maintenance _____
 Utilities _____
 Insurance _____

 % of home office _____

*Only fill in if claiming automobile expenses or home office expenses as required by employment or if self-employed. If claiming the simplified work from home deduction provide the number of days on the first page.

RENTAL INCOME AND EXPENSES

ADDRESS OF RENTAL PROPERTY _____

NUMBER OF UNITS _____

Rental Income _____
 Expenses _____
 Advertising _____
 Insurance _____
 Repairs and maintenance _____
 Management and administration _____

Accounting and Legal _____
 Property Tax _____
 Travel _____
 Utilities _____
 Interest expense _____
 Strata fees _____
 Assets purchased _____
 Other (Specify) _____

FOREIGN ASSET REPORTING

If you owned foreign property with a cost of greater than \$100,000 during 2021 such as vacation homes, foreign bank and securities accounts, shares of foreign companies, interests in foreign trusts or partnerships or interests in any property listed above, please describe. Please review our reporting letter for new changes to this form in 2021, especially regarding simplified reporting.

UNDERUSED HOUSING TAX (Generally only applicable to nonresidents)

Are you co-owner or a partner in a residential rental property? Co-owner Y/N Partner Y/N
 Are you on title for a residential property you do not live in? Y/N
 Do you have someone who does not live with you on title on your principal residence? Y/N
 Do you have a corporation that owns a residential property? Y/N