

Personal Income Tax Checklist

Instructions:

Please complete this checklist and return it to Yvonne Sulentic, Inc. with your personal income tax information (slips and receipts, etc.)

Name

Social Insurance Number

Address (if different from last year)

Street
City Province
Postal Code

Telephone

Email address

(By providing your e-mail address or updating an already registered email address on your tax return, you will be registered for online mail with the CRA. Paper notices will not be mailed to you from the CRA)

Birth Date (month, day, year)

Province of Residence on December 31, 2022

Are you a Canadian Citizen? Yes No

Canadian citizens only:

“Do you authorize the Canada Revenue Agency to provide your name, address and date of birth to Elections Canada for the National Register of Electors?” Yes No

Do you wish to start direct deposit or to change account information for your tax refund? Yes No

(If yes, attach a “void” personalized cheque or provide your financial institution name, branch and account number)

Marital Status Single Married Separated Widowed Common-Law

Information about spouse or common-law partner (if Yvonne Sulentic, Inc. is not preparing return of spouse or common-law partner)

Name
SIN Number
Birth Date (mm,dd,yy)
Net Income \$

Is your spouse self-employed? Yes No

For taxpayers who received pension income in 2022, do you wish to split pension income with your spouse? Yes No

Dependents:

<u>Name</u>	<u>Birthdate</u>	<u>Net Income (if any)</u>	<u>S.I.N. (if applicable)</u>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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Please ensure the following information is forwarded to us as soon as available:

1. All information slips

		Check if Information Attached
Employment (including CERB and/or CRB)	T4, T4A	<input type="checkbox"/>
Interest	T5	<input type="checkbox"/>
Dividends	T5	<input type="checkbox"/>
Mutual Funds and Other Trusts	T3	<input type="checkbox"/>
Old Age Security	T4A (OAS)	<input type="checkbox"/>
Canada Pension	T4A(P)	<input type="checkbox"/>
Employment Insurance	T4E	<input type="checkbox"/>
Income from RRSP or RRIF	T4RSP/ T4RIF	<input type="checkbox"/>
Purchase and Sale of Securities	T5008	<input type="checkbox"/>
Partnership income	T5013	<input type="checkbox"/>
Pension or Disability Payments	T4A	<input type="checkbox"/>
Social Assistance, Workers Compensation	T5007	<input type="checkbox"/>
Apprenticeship Incentive Grant	T4A (Box 28)	<input type="checkbox"/>
Other, including foreign slips		<input type="checkbox"/>

2. All official receipts

	Check if Information Attached
Registered Retirement Savings Plan Contributions	<input type="checkbox"/>
Charitable Donations	<input type="checkbox"/>
Political Donations	<input type="checkbox"/>
Professional or Union Dues	<input type="checkbox"/>
Tuition Fees (T2202/2202A/T111A*) <i>*If receipt is for a dependent, please have dependent sign in appropriate place on the form</i>	<input type="checkbox"/>

3. List of income and expenses for rental property.

(Please fill out the Rental Properties Checklist on our website)

4. List of income and expenses from self-employment activities.

(Please fill out the Self-Employment Checklist on our website)

5. Details of employment expenses

- Did you work at home for more than 50% of the time for at least four consecutive weeks in 2022 due to COVID-19? If **yes**, please provide the **number of days** you worked at home in 2022 (you can claim \$2 a day, up to \$500)
- Are you attaching a **Form T2200** "Declaration of Conditions of Employment" or Form **T2200S** "Declaration of Conditions of Employment for Working at Home Due to COVID-19" signed by your employer?
- Are you a tradesperson or apprentice working in the construction industry and did you incur temporary relocation expenses in 2022?

of Days

Yes No

Yes No

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5. Details of employment expenses (continued)

Office-in-the-home-expenses

Measurements

Square footage of entire house _____ Sq. Feet
 Square footage of room used for office _____ Sq. Feet

Expenses

Utilities (heat, water, electricity) \$
 Insurance (*applicable to commission employees only*) \$
 Maintenance \$
 Property tax (*applicable to commission employees only*) \$
 Other (please specify): _____ \$
 Other (please specify): _____ \$

Automobile Expenses**

(if more than one vehicle is used for business purposes, provide a separate listing of expenses for each vehicle)

- Cost of vehicle, if purchased in the year (attach invoice) \$
- Proceeds received on disposal of old vehicle, if applicable \$
- Gas and oil \$
- Repairs and maintenance \$
- Insurance \$
- License \$
- Total kilometers driven for the year _____ Kms
- Business kilometers driven for the year _____ Kms

** Please note that in order to substantiate your automobile expenses you are required to keep a **travel log** for the year. The log should indicate the date, destination to and from, and the business purpose of each trip. Commuting between your home and your regular place of work is not considered business travel.

6. Family Expenses

- Amount of support payments or alimony payments paid or received \$
- Name and address of payor/recipient
- Child care expenses (attach receipts from Daycare or Summer Camps) \$
- Adoption Expenses \$

7. Investments

- Listing of investments on which accrued interest is required to be reported and for which a tax reporting form has not been received
- Carrying charges and interest paid to earn income from investments (including investment counsel fees; safety deposit box fee does not qualify as carrying charges) \$
- Details on disposition of capital property (stocks, mutual funds, or other properties). Provide original purchase cost, sales proceeds and expenses on disposition
- Disposition of real property (original purchase date and cost, sales date, proceeds and expenses on disposition), including sale of your principal home. (If you changed the use of a real property, e.g. convert all or part of your principal residence to a rental or business operation or vice versa, it is considered a deemed disposition and needs to be reported.)

8. Other items

- Any other income received during the year, please provide amounts and descriptions \$
- Professional Dues or Membership Fees \$
- Form T1212 – Statement of Deferred Stock Options Benefits \$
- Amount of lifelong learning plan withdrawal or home buyer's plan withdrawal from your RRSP in the year \$
- Amount of RRSP contribution designated as loan repayment of a prior year loan \$
- Amount of interest paid on student loans \$
- Amount of medical expenses paid personally (for self, spouse or dependent) \$

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8. Other items (continued)

- Details regarding eligible moving expenses: _____ \$
- Are you entitled to a disability amount for yourself or a dependent? Yes No
- Are you entitled to disability supports deduction amount for yourself or a dependent? Yes No
- If you or your dependent are eligible for the disability tax credit, or if you or your dependent are 65 years of age or older at the end of the year, did you incur renovation expenses to your own home to allow you or your dependent to gain access to; to be mobile or functional or to reduce the risk of harm to you or your dependent within the dwelling? (tax credit available) Yes No
- Are you a first-time home buyer (tax credit available) Yes No
- If you are an eligible educator, did you buy teaching supplies in the year (refundable tax credit available) Yes No
- Did you complete an eligible program administered by BC Industry Training Authority in the year (refundable BC Training tax credit available) Yes No
- Name and amount paid to a qualified Canadian journalism organization (digital news subscription tax credit available) _____ \$
- Amount of instalment payments made for the year (attach statement) \$

9. Are you a U.S. citizen or do you hold a valid U.S. green card? Yes No

**If you are a U.S. citizen or hold a valid U.S. green card you are required to file a U.S. income tax return and may be required to file certain U.S. information returns. If you have not been filing any U.S. returns, please contact us immediately.*

10. Did you own foreign property at any time during the year, and the aggregate cost of which exceeded \$100,000? (If yes, there are foreign reporting requirements.) Yes No

11. Did you own an interest in a foreign affiliate at any time in 2022 (If yes, there are foreign reporting requirements.) Yes No