

2023 Personal Tax Checklist

Personal Information

No changes from last year (DO NOT complete this section)

	Taxpayer 1	Taxpayer 2 (Spouse)
Full Name:		
Social Insurance Number:		
Birth Date (mm/dd/yy):		
Citizenship:		
Address:		
Primary phone:		
Secondary phone:		
Email:		
Marital Status:		
Change in Marital Status in 2023?	Yes No If " Yes ", date status changed:	
Are we preparing your spouse's tax return?	Yes No If NO , please provide net income from line 23600 of their tax return:	
Any family members disabled?	Yes No	Yes No
Eligible for the Disability Tax Credit?	Yes No	Yes No
Do you authorize CRA to provide data to Elections Canada?	Yes No	Yes No
Do you authorize CRA to provide contact info to receive info about the organ and tissue donation program?	Yes No	Yes No

Children and/or Dependents Information

No changes from last year (DO NOT complete this section)

	Child 1	Child 2	Child 3
Full Name:			
Social Insurance Number:			
Relationship:			
Birthdate (yyyy/mm/dd):			
Preparing tax return? If no , please provide net income:	Yes No Net Income	Yes No Net Income	Yes No Net Income
Mentally or Physically Infirm?	Yes No	Yes No	Yes No
Eligible for the Disability Tax Credit?	Yes No	Yes No	Yes No

SALE OF PRINCIPAL RESIDENCE

You are required to report basic information on your tax return when you sell your principal residence in order to claim your principal residence exemption. Did you sell real estate property in 2023, including a principal residence?

Yes No

If yes, please provide the following:

1 Address of the property sold _____

2 Date of acquisition _____

3 Original cost of the property _____

4 Proceeds of disposition _____

FOREIGN PROPERTY

At any time in 2023, did you own or acquire the following specified foreign property with a total cost in excess of \$100,000 CAD?	Yes, please specify below:	No
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Please specify which of the following specified foreign property you owned during 2023:

- | | |
|---|---|
| <input type="checkbox"/> Foreign bank accounts
<input type="checkbox"/> Foreign tangible property (such as rental property)
<input type="checkbox"/> Share of non-resident corporations | <input type="checkbox"/> Interests in non-resident trusts
<input type="checkbox"/> Debt owed by a non-resident
<input type="checkbox"/> Other property outside Canada |
|---|---|

NOTE – Even if all your investments are held at a Canadian financial institution, you are considered to own a foreign property if your portfolio held any shares of a foreign corporation (i.e. shares of Apple Inc.) or any mutual funds that are not resident in Canada.

INCOME			
	PERSONAL		INVESTMENT
	T4 - Employment Income		T3 - Trust and Mutual Fund Income
	T4E - Employment Insurance Benefits		T5 – Investment Income (including interest, dividends, foreign income etc.)
	T4PS - Employee Profit-Sharing Plan Allocations and Income		T5008 - Statement of Security Transactions
	T4A - Pension, Retiring Allowances, Annuities, Fees or Commissions, Scholarships and Other Income		T5013 - Limited Partnership Income (Loss)
	T4A(OAS) - Old Age Security Benefits		T5018 – Statement of Contract Payments (For subcontractors in construction industry)
	T4A(P) - Canada Pension Plan Benefits		Capital Gains/Losses**
	T5007 – Workers Compensation or Social Assistance Benefits		Alimony Received**
	T4RIF - RRIF Income		Taxable Child Support Received
	T4RSP - RRSP Withdrawal		Scholarships/Bursaries
	Pension Income from Foreign Sources		Other - Specify
	Other – Specify		Other - Specify

**Did you collect any Alimony and/or Child Support from an ex-spouse? Yes No

- Name: _____
- SIN: _____
- Spousal Support: _____
- Child Support: _____

**Did you sell Securities (i.e., stocks, mutual funds) in a Non-Registered Account? Yes No

- If yes, please provide the **Realized Capital Gain/Loss Summary**, or the contact information of your investment advisor:

OTHER INCOME AND EXPENSES (please provide if necessary)	
Rental Income and Expenses	<input type="checkbox"/> Yes <input type="checkbox"/> No If YES, please provide detail of the income and expenses in Appendix A
Self-Employment Income and Expenses	<input type="checkbox"/> Yes <input type="checkbox"/> No If YES, please provide detail of the income and expenses in Appendix B
Employment/Commission Expenses	<input type="checkbox"/> Yes <input type="checkbox"/> No If YES, please provide detail of the income and expenses in Appendix C
Sale of Real Estate	<input type="checkbox"/> Yes <input type="checkbox"/> No If YES, please provide detail of the income and expenses in Appendix D
Other:	Other:

*If you answered "Yes" to any of the above items, please complete the supporting schedules found here:
<https://www.nbgcpa.ca/resources/>*

DECEASED TAXPAYER	
Did the taxpayer pass away last year?	<input type="checkbox"/> Yes <input type="checkbox"/> No If YES, please provide more detail in Appendix E

DEDUCTIONS AND CREDITS

PERSONAL

	Accounting Fees (other than NBG's fees)		Home Accessibility Expenses (renovations to improve accessibility, safety or functionality)
	Adoption Expenses		Interest and Carrying Charges on Investments
	Allowable Business Investment Loss		Interest Paid on Student Loans
	Apprentice Job Creation Credit		Investment Counsel Fees for Non-Registered Accounts
	Attendant Care Expenses		Investment in Labour-Sponsored Funds (Provide Form T5006)
	Caregiver Amount		Labour Mobility Deduction
	Charitable and/or Political Donations (Official Tax Receipts)		Medical Expenses
	Childcare Expenses		Medical Expense Tax Credit for Surrogacy and Other Expenses
	Clergy Residence Deduction (Please provide Form T1223)		Moving Expenses (if at least 40km's closer to work)
	Deductible Legal Fees		Property Taxes Paid
	Digital News Subscription		Rent Paid
	Disability Support Deductions		RRSP Receipts
	Disability Tax Credit Certificate		Tradespersons Tool Expenses
	Eligible Educator School Supply Expenses (for teachers and early educators only)		Tuition and Examination Fees for Self/Spouse/Children (Please provide Form T2202, TL11A)
	First -Time Home Buyers Tax Credit		Union and Professional Dues
	Form T2200 - Declaration of Conditions of Employment (if you have employment expenses)		Open FHSA Account/ Made FHSA contributions

NEW FOR 2023

	Multigenerational Home Renovation Expenses (renovations to build a secondary suite for seniors in your home)		
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OTHER IMPORTANT DOCUMENTS CHECKLIST

	New Clients: Notice of Assessment for Prior Year		New Clients: T1 Tax Return Filed for Prior Year
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OTHER INFORMATION

Please use this space for any additional information or notes: