



CRA requires proper documentation for all income, credits and deductions and requires you to retain your records for six years.

Income

- T3 – Interest or dividend income
- T4 – Employment income
- T4A – Commission income, pension income, scholarships, CERB, CRB, etc.
- T4E – Employment Insurance income
- T4A(P) – Canadian pension plan
- T4A(OAS) – Old age security
- T4RIF – Registered retirement income fund
- T4RSP – Withdrawal from an RRSP
- T4A(RCA) – Distribution from retirement compensation arrangement
- T4PS – Profit sharing plan

- T5 – Interest or dividend income
- T5007 – Worker's compensation, social assistance
- T5013 – Partnership income
- T101 – Statement of resource expenses
- Details on stock options (T5008)
- Income from alimony (please include separation agreement if not already on file)
- Retroactive lump-sum payment over \$3,000 (ie: spousal support)
- Income from self-employment (see self-employment worksheet)

- Director, professional or executor fees
- Income from tips, odd jobs, cash jobs

Foreign Income

- Foreign income or pension slips
- Details of foreign property held at any time during the year with a **cost in excess of \$100,000 CDN** (This includes cash, stocks, real property, digital currencies such as Bitcoin, trusts, partnerships and unregistered foreign stocks held in a Canadian account)
- > If qualified stocks are held, please provide a summary in CAD \$ (from broker)

Investments

- Capital Gain/Loss Report (from broker)
- Rental Property Income and Expenses (T776) See rental property worksheet & include Airbnb summaries if applicable
- Bitcoin or other cryptocurrency transactions, or any other investments
- Any other investments

NOTE: All investments should be CAD\$

Did you sell your principal residence (PR) OR any other real property in 2023?

If so, please provide: full address, year the property was acquired, original cost, proceeds, all owners on title, how many years is it designated as personal residence (Was it your PR for all years, or list applicable years)

Please indicate if the following occurred in 2023:

- Change in use (ie: from principal residence to rental property or vice versa)
- Deemed Disposition (upon death of property owner)

Credits/Deductions

- 2023 RRSP contributions to Feb 29/24
- 2023 T4FHSA contributions to Dec 31/23
- Home buyer's plan
- First-time home buyer in 2023
- Rent receipts for 2023
- Annual property tax statement 2023
- Investment council fees (unregistered acts)
- Annual interest statement on money borrowed to earn investment income
- Accounting or legal fee receipts
- Donations to registered charities
- Political contribution receipts (fed/prov)
- Professional, membership, or union dues receipt (if not included on T4)
- Childcare (day care, before/after care)
- Children's camps day overnight
- Adoption expenses
- Spousal/Child support amounts paid
- Copy of separation agreement stating alimony or child support payments
- Monthly senior public transit passes
- Clergy residence deduction info

- T2202A – Canadian tuition slips
- TL11A, C or D – Foreign tuition slips
- Canada/ON student loan interest
- Teacher/ECE school supplies tax credit (receipts required)
- Automobile expenses (see auto worksheet)
- Employment/home office expenses: T2200 detailed method (see employment expense worksheet: T777)
- Self-Employment (T2125) (see self-employment worksheet)
- Medical expense receipts for you, your spouse and any dependents
- Moving expenses: unreimbursed receipts (if moved 40km closer to work/school)
- Labour Mobility Deduction for tradespeople – receipts required
- Home accessibility tax credit (Fed): must be 65yrs of age in 2023, or eligible for DTC (up to \$20k in renos to enhance mobility)
- Multigenerational home renovation tax credit (up to \$50,000) – receipts required

Did you pay personal tax installments in 2023?

- Please provide payment details or CRA annual summary

TIPS TO ORGANIZE YOUR ANNUAL MEDICAL EXPENSES

- Call or visit your regular pharmacy to request an **annual prescription statement** to ensure you don't miss any claims & help reduce accounting fees
- If you have an insurance provider, include a copy of your whole family's full 2023 reimbursed expense claim summary. **Qualifying UNREIMBURSED medical claims can count towards your medical expense tax credit.**
- Only send us medical receipts NOT ALREADY shown on your annual insurance claim statements
- Visit **CRA website** for a complete listing of all eligible medical expenses

CONTACT UPDATE

PLEASE FILL OUT ALL APPLICABLE INFORMATION

Name _____

Date of birth _____

Email _____

Home phone _____

Cell phone _____

Work phone _____

Address _____

unit—number street

city province postal code

Citizenship _____ SIN _____

Gender Provide info to Elections Canada*
 M F N/A Yes No *Assumed yes if no response

MARITAL STATUS

Single Married Common-law
 Separated Divorced Widowed

DATE OF STATUS CHANGE (if during 2023): _____

If separation has occurred, please include a copy of your separation agreement if not already on file

SPOUSE/COMMON-LAW PARTNER INFORMATION

Spouse _____

Date of birth _____

Email _____

Cell phone _____

Work phone _____

Citizenship _____ SIN _____

Gender Provide info to Elections Canada*
 M F N/A Yes No *Assumed yes if no response

If we are not preparing your spouse or common law partner's return, please provide their **net income** (line 23600)

IMMIGRANTS/EMIGRANTS

Date of entry _____

Date of departure _____

Check your email for a **portal notification** when your final tax returns are ready

DO YOU WANT YOUR ORIGINAL DOCUMENTS RETURNED?

• **YES:** PICKUP MAIL

• **NO:** SHRED

(I have sent copies only – no original documents)

CLIENT INSTRUCTIONS:

- (1) Fill out contact update sheet.
- (2) Collect documents using T1 Checklist.
- (3) Once you have ALL required documents: **drop off, mail, or portal upload** your complete package to our office.
- (4) For portal uploads, scan all documents and upload in **one** upload. **(NO PHOTOS PLEASE)**
- (5) Please remove staples from any document sent.
- (6) We will contact you with questions or you will receive a portal notification once complete.

DEPENDENTS: First-time filer (18 in 2023) New baby (2023)

Name (1) _____

Date of birth _____

SIN _____

Relationship _____

Income _____

Name (2) _____

Date of birth _____

SIN _____

Relationship _____

Income _____

ORGAN & TISSUE DONOR REGISTRY: Information Request

Yes No As a resident of Ontario, do you consent to sharing your name and email with Trillium Gift of Life so they may contact or send you information about organ/tissue donation

DISABILITY CLAIMS: Eligible for Disability OR Infirmity

Type of disability _____

For whom _____

Form T2201 (for disability) on file with CRA

Apply for disability claim (T2201)

Date of T2201 expiry (if applicable) _____



• Log into your online CRA My Account to give us access as an **Authorized Representative**. Navigate to Profile section & scroll down to Manage Representatives. Please grant L&L LLP **LEVEL 2** access for **ALL accounts**. You will need to enter our business number: 815 561 386.

• Please upload your 2022 tax returns and most recent Notice of Assessments