

**Shared Office of
Hollinger Business Services & Lenise Davids, CPA**

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Personal Tax Checklist - What to Bring

Unsure of what to bring to prepare your 2023 T1 Personal Tax Return? We have prepared a checklist of forms and receipts to help.

Income

- Employment income (T4)
- Employment insurance benefits (T4E)
- Other, Pension or Partnership income (T4A, T4PS, T5013)
- Old Age Security and CPP benefits (T4A-OAS, T4A-P)
- Social assistance or Workers' compensation (T5007)
- RRSP, RIF or FHSA income (T4RSP, T4RIF, T4FHSA)
- Interest, dividends, mutual funds (T3, T5, T5008)
- Advanced Canada workers benefit (RC210)
- Foreign pension
- Spousal support payments received
- Tips
- All other information slips or income not reported on a slip

Business / Self-Employed

- Completed business summary form from our website

Rental Property

- Completed rental summary form from our website

Other Information

- Sale of principal residence
- Sale or deemed sale of stocks, bonds, or real estate
- Change of address
- New dependants (name, relation, birth date)
- Tax installments paid

Receipts

- Rent
- Property Tax
- Childcare and camps (exclude sports unless camp)
- Donations
- Political contributions
- Investment Mgmt Fees and Loan Interest (open money accounts)
- Medical and Prescription Summaries from Practitioner/Pharmacy
- Insurance Premium and Claim Summaries (summarize out-of-pocket costs)
- Personal attendant/nursing home care
- RRSP Contributions
- Tuition T2202 (get online from institution's portal)
- Adoption expenses
- Bus Passes (seniors only)
- Canadian Digital News Subscriptions
- Exams for professional certification or professional insurance
- FHSA First Home Savings Account Contributions
- Home accessibility expense list (CRA form available)
- Moving expenses (CRA form available)
- Multi-Generational Home Renovation expense list (CRA form available)
- Northern resident deduction (CRA form available)
- Student Government Loan Interest
- Support payments
- Teachers' school supplies
- Tool expense list
- Union Dues not included on your T4 slip

Employment Expenses

- Signed T2200 from employer
- Completed Employment expenses form from our website
- Tool expense list
- Teachers' school supplies
- Trucker Meals & Lodging TL2

Note: Working from home flat rate per day is NO longer available

**Excel summaries are available to download from our website:
Business, Rental Property, Employment Expenses**

www.HollingerBiz.com

www.LDavidsCPA.ca