



## 2023 HENDRY WARREN PERSONAL TAX CHECKLIST

<b>Name</b>	<b>Social Insurance Number:</b>	<b>Email:</b>
<b>Date of Birth (YYYY/MM/DD)</b>	<b>Telephone Number:</b>	
<b>Marital Status</b>	<b>Present Address:</b>	

*Personal Changes*

Additional Dependents? (Provide Name, DOB, and SIN on page 3)
Did you purchase your first home in 2023?
Did you move in 2023?
If yes, did you sell or change the use of real estate in 2023? (If yes, fill out Appendix E)
Other – Please Specify

*General*

Are you a Canadian citizen?
As a Canadian citizen, do you authorize the CRA to provide your name, address, date of birth, and citizenship to Elections Canada to update your information on the National Register of Electors?
ON Residents: Do you authorize CRA to provide your name and email address to Ontario Health so that they can contact you regarding organ and tissue donation?
Did you own or hold foreign property for the purposes of earning income at any time in 2023 with a total cost of more than CAD \$100,000? Examples include foreign real estate (except exclusively held for personal use), shares of foreign corporations held in Canadian or foreign brokerage accounts, foreign bank accounts, etc.
Are you a US citizen or green card holder?
Do you have a Tax-Free Savings Account (TFSA)?

*Income Slips (provide copies of slips)*

T4 - Employment Income
T4A OAS - Old Age Security
T4AP - Canada or Quebec Pension
T4A - Pension/Other Income
T4RIF/T4RSP - RRIF/RRSP Income
T4E - Employment Insurance
T5013 – Partnership Income
Other – Please Specify



<i>Other Income</i>	Business/Professional Income – (If yes, please fill out <a href="#">Appendix A</a> )
	Rental Income – (If yes, please fill out <a href="#">Appendix C</a> )
	Spousal Support Received
	If yes, please provide name, SIN, and address of payor:
	<b>Name:</b>
	<b>SIN:</b>
	<b>Address:</b>
Scholarship, Bursary & Fellowship Income	
Share Based Compensation (Stock Options, RSUs, etc.) in 2023 (If yes, please fill out <a href="#">Appendix D</a> )	
Other – Please Specify	

<i>Investments</i>	T3 - Income from a Trust
	T5 – Investment Income
	Capital Gains or Losses (Provide gain/loss reports in CAD)
	T1135 - Foreign Income Statement (foreign investments costing over 100,000 CAD)
	Cryptocurrency transactions (provide detailed summary of transactions in 2023)
	Other – Please Specify

<i>Deductions (Provide Receipts)</i>	RRSP Contributions (remainder of 2023 and first 60 days of 2024)
	Did you open a First Home Savings Account (FHSA) in 2023?
	Did you make any contributions to a FHSA in 2023? (provide receipts)
	Union or Professional Dues
	Childcare Expenses <i>(Please provide receipt with the name, address, and SIN/BN of childcare provider)</i>
	Moving Expenses



Spousal Support Paid

Child Support Paid

If applicable, please provide name, SIN, and address for recipient of spousal or child support:

**Name:**  
**SIN:**  
**Address:**

Investment Management Fees

Interest Expense

Employment Expenses (If yes, please fill out Appendix B or Appendix F)

Other – Please Specify

*Tax  
Credits  
(Provide  
Receipts)*

Tuition (T2202 or TL11A for foreign tuition)

Medical Receipts

Medical Insurance Premiums (include annual statement)

Home Accessibility Expenses

Donations

Political Contributions

ON Residents: Property Taxes (Final 2023 bill)/Rent Receipts

Teacher and Early Child Educator School Supply Tax Credit

Interest on Student Loans

Digital News Subscription Tax Credit

Other – Please Specify

**Schedule of Additional Dependents**

<b>Name</b>	<b>SIN</b>	<b>DOB (YYYY/MM/DD)</b>