



2023 HENDRY WARREN PERSONAL TAX CHECKLIST

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

Personal Changes

Additional Dependents? (Provide Name, DOB, and SIN on page 4)
 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?
 My employer or my spouse’s employer provided basic prescription drug insurance for myself (all year)
 My employer or my spouse’s employer provided basic prescription drug insurance for myself (partial year; please confirm months)
 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 & RL-1 - Employment Income
 T4A OAS - Old Age Security
 T4AP - Canada or Quebec Pension
 T4A & RL-1/RL-2 - Pension/Other Income
 T4RIF/T4RSP & RL-2 - RRIF/RRSP Income
 T4E & RL-6 - Employment Insurance
 T5013 & RL-15 – Partnership Income
 Other – Please Specify



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

<i>Investments</i>	T3 & RL-16 - Income from a Trust
	T5 & RL-3 – 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 (Please provide receipt with the name, address, and SIN/BN of childcare provider <u>or</u> RL-24 Slips and confirm how the claim should be split between you and your spouse)
	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

Tuition (T2202 or TL11A for foreign tuition or RL-8 for Québec)

Medical Receipts

Medical Insurance Premiums (include annual statement)

Home Accessibility Expenses

Donations

Political Contributions

Teacher and Early Child Educator School Supply Tax Credit

Interest on Student Loans

Digital News Subscription Tax Credit

Children’s Activity Tax Credit

Seniors’ Activity Tax Credit

Tax Credit for Upgrading of Residential Wastewater Treatment Systems

Québec income tax instalments for 2023 (provide amount)

To the extent that one spouse is owed a refund and the other spouse has a balance due in Québec, apply the refund of one spouse to the balance due of the other spouse

Other – Please Specify

*Tax Credits
(Provide Receipts)*

Please provide us with a copy of your 2022 Québec Notice of Assessment and copies of any Québec reassessments received during 2023 in respect of previous years.





Schedule of Additional Dependents

Name	SIN	DOB (YYYY/MM/DD)