

2023 Personal Tax Return Checklist

For Office Use Only:

Date Received: _____

Preparer: _____

Reviewer: _____

2023 T1 Bill (before HST): _____

Ref/Owe: _____

Name: _____

Social Insurance _____ Date of Birth: _____

Phone Number (h) _____ (c) _____

Address (if new): _____

Persons authorized to pick up your return (if not you): _____

Electronic or Paper Copy? Email address: _____

Information received as: _____

***New items are highlighted yellow**

Please note: CRA now requires that all payments over \$10,000 need to be made electronically.

Family information:

Marital Status: Single Common Law Married Separated Divorced Widow.

Did your marital status change in 2023? Yes No If so, what was the date: _____

Spouse/Partner Name _____ SIN: _____ DOB: _____

Are we filing a return for your spouse? Yes No Check if your spouse had no income for 2023

Do you have an eligible equivalent to spouse? Yes No

Name and birth date of children born in 2023 _____

Dependent name(s) and SIN(s) if applicable (< 19 years old): _____

Are all persons described above Canadian citizens? Yes No If no, please specify _____

Do all filing persons wish to register with Elections Canada for 2023? Yes No

Did you have foreign property valued at more than \$100,000 in 2023? Yes No

Do you drive a company vehicle? Yes No

Do you own any companies? Yes No

If yes, please provide the names _____

2023 Income – Please provide the following:

Employment income - please include:

- T4 slips for all sources of employment.
- List of expenses associated with employment. Note: Your employer needs to complete a T2200 for you to be eligible.
- Tradesperson's eligible tools (Maximum deduction of **\$1,000**)

Self-employed fisher / sole proprietor income - please include:

- List of all income List of all business expenses Annual dues or professional memberships
- Use of vehicle for 2023: # of personal kms _____ # of business kms _____ Type of vehicle _____
- Did you purchase a zero-emission vehicle in 2023? _____
- Fishing settlements bait, fuel expenses and administrative fees, etc.
- CEWS – 75% Wage subsidy. Total received \$ _____
- Fisher Grant – Total received (or repaid) \$ _____
- Air quality improvement tax credit (submit receipts for heat pumps, ventilation systems, etc.)

Investment income – please include:

- Investment income slips (T5, T3, etc.) Note: T3 slips may not be received until end of March.
- T3 slips for any monies received from a Family Trust
- Did you sell shares in 2023? If so, please enclose a gain/loss report.
- Do you have eligible (qualified Canadian journalism) digital media subscription fees to deduct? Max = \$500
- Management fees paid on investment portfolios \$ _____
- Do you hold investment loans? If so, what interest did you pay for 2023? _____
- Did you sell any property in 2023? (i.e., Cottage, land, **principal residence**, etc.)

Other income – please include:

- Canada Pension Plan - T4A (P) Old Age Security - T4A (OAS) Registered Retirement Plans - T4RIF
- RRSP withdrawals - T4RSP Unemployment - T4E Commission income – T4A
- Scholarships or bursaries – T4A Workers’ Compensation – T5007 Social Assistance – T5007
- Spousal support \$ _____ Universal Child Care RC 62 CERB – T4A or T4E
- Rental income - Please enclose report of income and expenses.
- Do you wish to split pension income with a spouse? Yes No

Tax Credits:

Medical expenses include prescriptions, prescribed medical supplies, dental, VON care, blood collection fees (**Your pharmacy can print you out a complete list of prescriptions for 2023**, which is preferable to the individual receipts. If you do not obtain an annual receipt, please add slips, and list totals for each taxpayer. Please note: Massage therapy is not eligible as a medical expense in the province of Nova Scotia.

Surrogacy and fertility expenses

Health insurance or Nova Scotia Pharmacare fees

Did you travel for medical purposes in 2023? If so, please indicate dates, # of kms travelled and whether you were medically required to have a driver. You also require a letter of proof for the appointments.

Are you or any member of your family disabled? Name: _____

Are you a caregiver? If so, please indicate name and SIN of the individual and their net income for 2023:

Tuition slips

Will they be transferring the tuition credit to their parent’s return? Yes No

(Please submit tuition slips already signed by the student on the back). Please note: the 2021 budget extended eligible tuition credits to include occupational skills courses taken at post-secondary institutions.

Canada Training Credit – courses for occupational, professional or trade examinations (Please include receipts)

Student loan interest

Are you a teacher? If so, you need a signed statement from the employer that verifies purchase of eligible teaching supply receipts up to \$1,000 to claim the \$150 tax credit.

Did you renovate components of your house for accessibility purposes? (Up to \$3,000 federal tax credit)
(Note: Requires eligibility for the disability credit OR age of 65 to claim this credit – please enclose invoices)

Did you renovate components of your house for adding a second dwelling for a disabled or over the age of 65 family member? (Up to \$7,500 federal tax credit based on \$50,000 of eligible expenses)

RRSP contributions Total of 2023 \$ _____ Home Buyer’s Plan? Yes No

First Home Savings Account (FHSA) contributions Total of 2023 \$ _____

Childcare expenses – please enclose receipts with business number or social insurance number and name of provider.

Donations

First-time home buyer in 2023?

NS Children’s Sports and Arts Refundable Tax Credit 2023? Provide up to \$500 in registration fee receipts

Volunteer firefighter / search & rescue? Do you have at least 200 hours of volunteer service in 2023? Yes No
*You must have an official letter from the chief or delegate with full contact information and signature.

Moving expenses: Date of move _____ Reason _____

Tax Installments paid \$ _____

Other Information:
