

2023 Personal Income Tax Return Checklist

To ensure you are well-prepared to submit your income tax return, please keep the following key points in mind:

1. **Tax Filing Deadline:** The deadline for most Canadians to file their 2023 income tax returns is **April 30, 2024**.
2. **Timely Submission:** To facilitate the timely completion and filing of your tax returns, we kindly request that you provide all necessary documentation and information by **March 31, 2024**.
3. **Consolidate Information:** To streamline communication and ensure efficiency, we recommend sending your information in a single upload (if using our portal) or a single email.
4. **Resources:** Visit our website to review the **2023 Tax Information Publication** for helpful resources, including the Self-Employed Worksheet, and Rental Income/Expense Worksheet.

Identification Information			
Name: _____	Spouse: _____		
Date of Birth: _____	Date of Birth: _____		
Address: _____ _____	Phone: Home _____ Office _____		
Email: _____	Email: _____		
Dependent children	S.I.N.	Date of Birth	Did you or your spouse dispose of your principal residence? Yes [] No [] (if Yes, see principal residence disposition)
_____	_____	_____	
_____	_____	_____	
_____	_____	_____	
Any change to your marital status during the year? Yes [] No []	Date of change: _____		Did you become (or cease to be) a resident of Canada during the year? Yes [] No [] Date of entry/departure: _____

Elections Canada	
Are you a Canadian citizen? Yes [] No []	As a Canadian citizen, do you authorize the CRA to provide your name, address, date of birth and citizenship to Elections Canada? Yes [] No []

U.S. Person	
Are you or your family members U.S. citizens, U.S. greencard holders or U.S. residents? If so, please specify the name of the individual _____	Yes [] No []
Did you earn any U.S. income (other than interest, dividends, or dispositions of U.S. securities)? This would include income from a U.S. partnership (reported on Schedule K-1), wages or selling U.S. property?	Yes [] No []

Other Comments or Information	

Canadian and Foreign Sources of Income <i>(provide slips, documents or details)</i>	
Employment (T4) []	Capital property dispositions [] <i>(Provide proceeds, actual cost, commission fees, dates of acquisition and disposition of stocks/bonds/mutual funds, real estate, personal property, jewelry, works of art, etc.)</i>
Pension/retiring allowance (T4A) []	
Stock options held in the year []	
Self-employed commission income []	Principal residence disposition [] <i>(Provide the sales agreement and year of acquisition)</i>
Employment insurance (T4E) []	Other real properties disposition [] <i>(Provide statement of adjustment and lawyer's trust ledger for the acquisition as well as disposition of property, commission fees, renovation costs)</i>
CPP/QPP/OAS (T4A(P)/T4A(OAS)) []	Was there a sale of residential real estate or sale of an assignment owned for less than 365 days? [] <i>(Provide details about timing of sale)</i>
RRSP, DPSP, RPP, RRIF (T4RSP/T4RIF) []	Business/professional income/expenses []
Dividends (T5) []	Rental income/expenses []
Interest (T5/T600) []	Farming/fishing income/expenses []
Mutual funds/estates/trusts (T3) []	Support payments received []
Partnerships/tax shelters (T5013/T101) []	Other sources of income:
Spouse's net income <i>(if not prepared by GG)</i> \$ _____	_____ []
	_____ []
<p>Note: Through a matching program of tax information slips, the CRA is imposing harsh penalties for unreported income. Please provide us with any late or amended tax slips (i.e. slips received after sending package to GG) to avoid exposure to penalties.</p>	

Deductions and Credits <i>(provide receipts, documents or details)</i>	
RRSP contributions []	Tuition and Education Credit Certificate (T2202) []
Union/professional membership dues []	Tuition and Education Credit Certificate (TL11A) for tuition paid to international institutions []
Child care expenses []	Interest paid on registered student loans []
Support payments made []	Home accessibility/safety expenses ¹ []
Accounting/legal/investment counsel fees []	Medical expenses []
Interest paid on investments []	<i>(including attendant care, medical insurance premium, treatment of fertility. For multiple expenses from the same provider, please request yearly summary from your pharmacy/practitioner)</i>
Moving expenses []	

Deductible employment expenses (T2200) (including home office expenses ²)	[]	Charitable donations (monetary and non-monetary)	[]
Political/municipal contributions	[]	Adoption expenses	[]
Eligible educator school supply expenses	[]	Property tax or rent paid for principal residence	[]
Emergency services volunteer/search and rescue volunteer	[]	Digital news subscription expense paid to qualifying Canadian journalism organization	[]
Did you renovate your home to build a secondary unit that enables a senior or an adult who is eligible for the disability tax credit to live with a family member? You may be eligible for the Multigenerational Home Renovation Tax Credit (MHRTC) of up to \$7,500 (15% of \$50,000).	[]	Other expenses/deductions/credits	[]
		_____	[]
		_____	[]
Income tax instalments/foreign taxes paid	[]	Did you open and/or contribute to a First Home Savings Account (FHSA)?	[]

Foreign Property

(If "Yes", please provide details or contact your GG advisor)

• At any time in 2023 did you own or acquire specified foreign property ³ (non-Canadian), with a total cost in excess of CAD\$100,000?	Yes [] No []
• At any time in the year, did you transfer or loan property or funds to a non-Canadian trust?	Yes [] No []
• At any time in the year, did you receive funds or property from, or were you indebted to, a non-Canadian trust in which you were a beneficiary?	Yes [] No []
• Do you own or did you acquire shares of a foreign affiliate in the year? (generally, a foreign affiliate is a non-Canadian corporation in which you have at least a 1% interest and you, together with related persons, have at least a combined 10% interest)	Yes [] No []

¹ The credit allows an eligible individual to claim renovation work and equipment acquired to help improve the accessibility and safety at home for an individual who is 65 years of age or older, or has a disability. A spouse or close relative living with the qualifying individual is also eligible to claim the credit. Eligible expenses include wheelchair ramp, walk-in bathtub, walk-in shower, support bar.

² If you worked more than 50% of the time from home for a period of at least 4 consecutive weeks due to an arrangement with your employer, then you may be eligible to claim home office expenses either through the detailed method.

- Detailed method for home office expenses – Please provide us with T2200 form signed by your employer for working at home and a summary of your home office expenses: hydro, heating, water, rent, property management, repairs and maintenance, (insurance and property tax for employees earning commission);
- The temporary flat rate method does not apply to 2023.

³ Specified foreign property includes foreign bank accounts, foreign tangible property (such as a rental property), shares of non-Canadian corporations, and interests in non-Canadian trusts or other non-Canadian entities. Excluded items include property used in an active business, shares or indebtedness of a foreign affiliate, personal-use property (such as a vacation home), interests in foreign trusts that provide retirement benefits, assets held within a RRSP, a RRIF or a RPP and foreign investments held in mutual funds registered in Canada.