

STE ANNE TAX SERVICE - 2022 TAX INFORMATION CHECKLIST (Ste Anne & area *)

Name(s) _____ (return by TaxFolder or drop off)

Phone(s) _____

Email(s) _____

Residential Address _____

Please choose the pricing option that fits you best:

- Worry Free**
- Optimization**
- Early Bird Basic** (valid only for clients in our area * who provide all tax documents before March 12)

Any information changed? If yes, see reverse

- Name, Address, Mailing Address, Phone (1,5,6)
- Added Dependants (2)
- Marital Status (3)
- Banking Confirmed / Changed (4,21)

If yes to any of the below, see reverse

- Did you sell or dispose of a home or property in 2022 including your Principal Residence (5,6)
- Did you own Foreign Property or Investments for a cost of more than \$100,000 (7)
- Did you financially support a disabled family member (8)

Slips used to prepare tax returns

(we can access most from CRA)

- T3 Investment
- T4 Employment
- T4 OAS
- T4 CPP
- T4A Pension / Coop
- T4 RRIF
- T4 RRSP
- T4 Employment Insurance
- T4PS Profit Sharing Plan
- T5 Interest / Investment
- T5007 WCB / EIA
- T5008 Sale of Securities
- T5018 Subcontract Payment
- RRSP Receipts Mar – Dec 2022
- RRSP Receipts Jan 1 – Mar 1 2023

Other Income Sources (## see reverse)

- CCB / CAI / GST; not taxable, no tax slip issued
- Tips (keep a tip log)
- Child / Spousal Support received
- Foreign Pension Income / taxes paid
- Sale of Investments (13)
- Rental property (15)
- Self-employed (16)
- Social Media / Gaming (17)
- Dispose of vacant land / cottage (18)
- Cryptocurrency capital gains
- Clinical Research Compensation

Receipts for Deductions (## see reverse)

- Union Dues, Professional Fees / Insurance
- Child Care Receipts (9)
- Moving Expenses (new job or accessibility)
- Investment Expenses (14)
- Child / Spousal Support paid
- T2200 & TL2 Employment Expenses
- Trucker's Meal Logs (20)

Receipts for Credits (## see reverse)

- Rent # of months paid (shared with roommate?)
 - Property Tax Bill (10)
 - Charity Donations / Political Contributions
 - Medical: pharmacy annual lists, health plan annual print-out, dental, eyewear, travel log, travel health insurance, chiropractor, incontinence pads (11)
Less Canada Dental Benefit (to Dec 31 2022)
 - Health Premiums (12)
 - Child Fitness / Sports / Arts (MB credits <16 or 16-24)
 - Student Loan Interest; Canada/Manitoba only
 - T2202 Tuition Receipt
 - Reno Expenses for improved accessibility
 - Educator School Supply Tax Credit
 - Digital Subscription Tax Credit
- ## COVID-19 Specific items (## see reverse)
- Working at Home Due to COVID-19 (19)
 - Repayment of CERB, CRB etc (on T4A)

* Our service area includes: Town of Ste Anne;
RMs of Ste Anne, Tache, La Broquerie, Reynolds, Whitemouth;
Whiteshell Provincial Park; Communities of Woodridge,
Sandilands, Monominto, Ostenfeld, Prairie Grove

2022 Tax Checklist; more details if yes to some of the questions

- 1) Name: copy of marriage certificate, legal name change certificate or driver's licence
- 2) Added Dependents: name, birthdate
- 3) Marital Status: ask us for detailed questionnaire
- 4) Banking: provide void cheque or banking info from on-line banking
- 5) Moved: Old home: residential & mailing address, rent or lawyer docs; New home: residential & mailing address, rent or lawyer docs; new home buyer; ask us for detailed questionnaire
- 6) Sell Principal Residence: what year purchased? selling price? joint? If you owned other property like a cottage for any years at the same time, we need more info
- 7) Own foreign property or investment that cost more than \$100,000 (including cryptocurrency): provide details
- 8) Financially support a disabled family member: ask us for detailed questionnaire
- 9) Child Care receipts: if individual provided service need full name and SIN on receipt
- 10) Property Tax bill: if under 65 and did not get \$437.50 credit or if over 65 and combined income under \$63,000 (for Senior School Tax Rebate); we need the bill (not just receipt)
- 11) Medical expenses: ask for a medical travel log, look at Awesome Tax Tips; review CRA medical expenses; or ask us if not sure!
- 12) Health Care premiums: T4 employment box 85 or year-end pay statement showing employee's portion paid or letter from employer; or T4A pension box 135; or through bank account: get receipt from Blue Cross or others
- 13) Sale of Investments capital gains/losses: need statement gains/losses or T5008
- 14) Investment fees: only if paid out of pocket, cannot claim if deducted from mutual funds; interest on investment loan
- 15) Rental property: ask us for Statement of Rental Property to provide details
- 16) Self-employed: ask us for Statement of Business Activities to provide details
- 17) Social Media Influencers and Video Game Streamers: must claim paid endorsements
- 18) Sale of vacant land / cottage: call us so we can request all details
- 19) Working at home due to COVID-19: similar to 2020, 2021
- 20) Trucker's meal logs: provide logs or calculate for the year (refer to CRA's guidelines)
- 21) Banking info: confirm your banking info with CRA My Account. If you do not normally get a refund, provide us with your banking info so we can update CRA's info; we do not have access to view your current banking info with CRA. Both spouses should provide banking info, CRA will pay the Climate Action Incentive to the spouse they process first.

(Please do not bring us any prior year tax info unless we ask)

*Thank you for the trust you place in our team at **Ste Anne Tax Service!***

204.422.6631 Toll Free 1.833.980.1060

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SteAnneTaxService.ca

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