

# STE ANNE TAX SERVICE - 2023 TAX INFORMATION CHECKLIST

Name(s) \_\_\_\_\_ (return by TaxFolder or drop off)

Phone(s) \_\_\_\_\_

Email(s) \_\_\_\_\_

Residential Address \_\_\_\_\_

## Any information changed? If yes, see reverse

- Name, Address, Mailing Address, Phone (1,5,6)
- Added Dependants (2)
- Personal Relationship Status (3)
- Banking Changed (4)

## If yes to any of the below, see reverse

- Did you sell or dispose of a home or property including your Principal Residence; did you change the use of a property (to or from rental); did you own your home less than 365 days (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)
- Did you add or were you added as a joint owner to your or someone else's home or bank account (24, 25)

## 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 FHSA
- T4 Employment Insurance
- T4PS Profit Sharing Plan
- T5 Interest / Investment
- T5007 WCB / EIA
- T5008 Sale of Securities
- T5018 Subcontract Payment
- RC210 Canada Workers Advance Benefit

## 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 (14)
- Rental property (16)
- Self-employed (incl Multi-Level Marketing) (17)
- Dispose of vacant land / cottage (19)
- Cryptocurrency capital gains / online Gambling
- Social Media & Gaming (sponsorship) (18)
- Content Creator income (YouTube, TikTok)
- Sharing Economy (AirBnB, Vrbo, Uber, Lyft)
- Executor Fees / Director Fees

## Receipts for Deductions (## see reverse)

- RRSP Receipts Mar 2023 – Feb 29 2024
- FHSA Receipts Apr – Dec 2023 (22)
- Union Dues, Professional Fees, Insurance (23)
- Child Care Receipts (9)
- Moving Expenses (new job or accessibility)
- Investment Expenses (15)
- Child / Spousal Support paid (10)
- Employment Expenses (21)
- Trucker's Meal Logs (20)
- CERB/CRB repayment, T4A or T4E

## Receipts for Credits (## see reverse)

- Rent # of months paid (shared with roommate?)
- Property Tax bill (11), not just the receipt
- Charitable Donations / Political Contributions
- Medical: pharmacy annual lists, health plan annual print-out, eyewear, travel log, travel health insurance, chiropractor, incontinence pads, dental less Canada Dental Benefit (12)
- Health Care premiums (13)
- Child Fitness / Sports / Arts (MB credits <16 or 16-24)
- Tuition Receipt T2202
- Student Loan Interest; Canada/Manitoba only
- Home Accessibility Tax Credit (renos)
- Multigenerational Home Renovation Tax Credit (MHRTC)
- Educator School Supply Tax Credit
- Digital Subscription Tax Credit

## 2023 Tax Checklist; more details if yes to some of the questions

- 1) Name Change: copy of marriage certificate, legal name change certificate, or driver's licence
- 2) Added Dependents: name, birthdate, SIN
- 3) Personal Relationship / Marital Status: ask us for detailed questionnaire
- 4) Banking: if changed, provide void cheque or banking info from on-line banking (must have name on it); we cannot 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
- 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: year purchased? selling price? joint? owned less than 365 days? If you owned other property like a cottage or if you changed the use to or from rental; we need more info
- 7) Own foreign property or investment that cost more than \$100,000 (including cryptocurrency); own a winter home outside of Canada: provide details
- 8) Financially support a disabled family member: ask us for detailed questionnaire
- 9) Child Care receipts: if an individual provided service need full name and SIN on receipt
- 10) If you pay any child or spousal support, CRA requires a T1158 accompanied by the court order or separation agreement; change to support payments? Need a new T1158; ask us for more details
- 11) Property Tax bill: if under 65 and did not get \$350.00 credit or if over 65 and combined income under \$63,000 (for Senior School Tax Rebate); we need the bill (not just receipt)
- 12) Medical expenses: ask for a medical travel log, look at Awesome Tax Tips; or ask us if not sure!
- 13) Health Care premiums: T4 employment box 85 or year-end pay statement or letter from employer; or T4A pension box 135; or through bank account: get receipt from Blue Cross or others
- 14) Sale of Investments: need statement gains / losses or T5008
- 15) Investment fees: only if paid out of pocket, cannot claim if deducted from mutual funds; interest on investment loan
- 16) Rental property: ask us for Statement of Rental Property
- 17) Self-employed: ask us for Statement of Business Activities
- 18) Social Media Influencers and Video Game Streamers: must claim paid endorsement and sponsorship
- 19) Sale of vacant land / cottage: call us so we can request all details
- 20) Trucker's meal logs: provide logs or calculate for the year (refer to CRA's guidelines); TL2 required
- 21) To claim any employment expenses, your employer must provide you with a signed T2200; if you are salaried, working from home must be more than 50%; for 2023, flat rate is no longer available
- 22) First Home Savings Account (FHSA): you can claim up to \$8,000 in contributions made by December 2023
- 23) Union Dues and Professional Fees / Insurance: you can only claim if paid out of pocket; if reimbursed in part by employer, include invoice / statement for the full amount and reimbursed amount
- 24) New for December 31 2023, trust tax return may need to be filed if you are joint owner on someone else's asset or you added a joint owner to your own asset; for example, cosigning for a home purchase or added to a bank account or holding money in trust for children or grandchildren; let us know so we can help you.
- 25) Underused Housing Tax; if you cosigned for a home purchase for someone else during 2022, you may need to file an UHT return (as a trustee or agent); let us know so we can help you.

*(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**

**info@sataxes.ca**

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