



T1 Checklist - 2023

PERSONAL INFORMATION

Taxpayer 1

NAME: _____

ADDRESS: _____

SOCIAL INSURANCE NUMBER: _____ DATE OF BIRTH D/M/Y: _____

DID YOU MOVE DURING THE YEAR? _____ PROVINCE OF RESIDENCE ON DECEMBER 31, 2023: _____

MARITAL STATUS: _____ DID YOUR MARTIAL STATUS CHANGE IN 2023? _____
@ Dec 31, 2023 ARE YOU A U.S. CITIZEN OR GREENCARD HOLDER? _____

PHONE NUMBER (Home) _____ (Work) _____ (Cellular) _____

(E-mail address) _____

Taxpayer 2

IF MARRIED OR COMMON LAW - NAME OF SPOUSE: _____

ADDRESS (if different from above): _____

SOCIAL INSURANCE NUMBER: _____ DATE OF BIRTH D/M/Y: _____

ARE YOU A U.S. CITIZEN OR GREENCARD HOLDER? _____

PHONE NUMBER (Home) _____ (Work) _____ (Cellular) _____

(E-mail address) _____

DEPENDANTS

DEPENDANT 1

DEPENDANT 2

DEPENDANT 3

NAME

ADDRESS (if different from yours) _____

SOCIAL INSURANCE _____

DATE OF BIRTH D/M/Y _____

TUITION FEES _____



T1 Checklist - 2023

Complete the Following Schedules Separately for Each Taxpayer Where Applicable

Check if Applicable**INFORMATION REQUIRED**

INCOME

If you received income from any of the sources listed below please attach the information required:

- | | |
|---|---|
| <input type="checkbox"/> Salary or Wages or Commissions or Director's or Other Fees or Retiring Allowance | <input type="checkbox"/> T4 or T4A |
| <input type="checkbox"/> Old Age Security Pension, Canada Pension, Other | <input type="checkbox"/> T4A(OAS), T4A(P) |
| <input type="checkbox"/> Foreign Pensions (including U.S. Social Security) | <input type="checkbox"/> List details |
| <input type="checkbox"/> Canada Recovery Benefit (CRB), Canada Recovery Sickness Benefit (CRSB) or Canada Recovery Caregiver Benefit (CRCB) | <input type="checkbox"/> T4A |
| <input type="checkbox"/> Employment Insurance Benefits | <input type="checkbox"/> T4E |
| <input type="checkbox"/> Dividends and Interest (Canada Savings Bonds, Banks, etc.) | <input type="checkbox"/> T5 |
| <input type="checkbox"/> Foreign Dividends and Interest | <input type="checkbox"/> List or foreign slips |
| <input type="checkbox"/> Dividends and Interest (Estate or Trust Income, Trust Companies, etc.) | <input type="checkbox"/> T3 |
| <input type="checkbox"/> Other Interest - Mortgage, Loans, other Securities and Income Tax Refunds | <input type="checkbox"/> List/brokerage slips/details |
| <input type="checkbox"/> Annuities (indicate if received amount due to the death of your spouse) | <input type="checkbox"/> T4A or list |
| <input type="checkbox"/> Rental Income | <input type="checkbox"/> See attached checklist |
| <input type="checkbox"/> Self-employed | <input type="checkbox"/> See attached checklist |
| <input type="checkbox"/> Capital Gains or Losses | <input type="checkbox"/> Details/Broker Statements |
| <input type="checkbox"/> Business/Professional Income | <input type="checkbox"/> Income Statement |
| <input type="checkbox"/> Limited Partnership Income or Loss (include financial statements) | <input type="checkbox"/> T5013, T5013 S(1) |
| <input type="checkbox"/> Withdrawal of RRSP Funds | <input type="checkbox"/> T4 RSP |
| <input type="checkbox"/> Alimony, Separation Allowances | <input type="checkbox"/> Details |
| <input type="checkbox"/> Scholarships or Research Grants | <input type="checkbox"/> T4A (or list) |
| <input type="checkbox"/> Profit Sharing Plans | <input type="checkbox"/> T4PS |
| <input type="checkbox"/> Registered Retirement Income Funds | <input type="checkbox"/> T4RIF |
| <input type="checkbox"/> Other Income | <input type="checkbox"/> List or T4A |
| <input type="checkbox"/> Guaranteed Income Supplement* | <input type="checkbox"/> List, T4A(OAS) |
| <input type="checkbox"/> Workers' Compensation Payments* | <input type="checkbox"/> List, T5007 |

* Although the above two amounts are not taxable, they are considered to be income for purposes of determining your eligibility for certain credits and if you are considered a dependent of someone else.



T1 Checklist - 2023

Check if Applicable	INFORMATION REQUIRED
DEDUCTIONS AND CREDITS	
If you made any of the following payments, please attach the information required.	
<input type="checkbox"/> Registered Pension Plan Contributions or RRSP Contributions	<input type="checkbox"/> Official receipts
<input type="checkbox"/> Annual Professional or Union Dues	<input type="checkbox"/> Official receipts
<input type="checkbox"/> Child Care Expense	<input type="checkbox"/> Receipts
<input type="checkbox"/> Carrying Charges on Investment Income (Loan Interest, Investment Fees, Accounting Fees)	<input type="checkbox"/> Details
<input type="checkbox"/> All Income Taxes paid or payable to Foreign Governments	<input type="checkbox"/> Proof of payment
<input type="checkbox"/> Moving Expenses	<input type="checkbox"/> Receipts and details
<input type="checkbox"/> Alimony, Separation Allowances	<input type="checkbox"/> Details
<input type="checkbox"/> Legal Fees paid to collect Taxable Income such as Alimony or Salary	<input type="checkbox"/> List
<input type="checkbox"/> Staycation credit	<input type="checkbox"/> Ontario lodging receipts
<input type="checkbox"/> Charitable Donations	<input type="checkbox"/> Official receipts
<input type="checkbox"/> Medical and Dental Expenses (includes premiums paid to private health care plans, but excludes expenses for which you are reimbursed by the plans)	<input type="checkbox"/> Receipts
<input type="checkbox"/> Adoption Expenses	<input type="checkbox"/> Receipts
<input type="checkbox"/> Political Donations	<input type="checkbox"/> Official receipts
<input type="checkbox"/> Salesperson's Expenses (automobile, travel, entertainment, etc.)	<input type="checkbox"/> Categorized list of amounts/T2200
<input type="checkbox"/> Home office expenses	<input type="checkbox"/> Refer to attached checklist
<input type="checkbox"/> Tax Instalment payments remitted towards your 2023 taxes	<input type="checkbox"/> Details or info from CRA



T1 Checklist - 2023

OTHER ITEMS

- Were you a student in full-time attendance at a University or College, or in a full-time correspondence course at any time during the year? T2202A
- Were any of your dependants students in full-time attendance or in a full-time correspondence at a University or College who did not use all of the tuition or education credits? T2202A
- Were you, or any of your dependants', students in full-time attendance at a foreign University or College at any time during the year? TL11A, TL11C, TL11D
- Are you, your spouse or a dependant child severely disabled?
A medical practitioner must certify that the individual has a severe and prolonged impairment. T2201
- Do you receive a motor vehicle or travel allowance that is included in your T4? Details, on what is it based
- Are you or your spouse U.S. citizens or holders of "Green Cards"? Under U.S. tax law all such people are required to file U.S. income tax returns and report their worldwide income every year. Any U.S. tax paid can be claimed as a Foreign Tax Credit on your Canadian tax return.
- If you or your spouse spent over 60 days in the U.S. in any of the last three years, please list the numbers of days in the U.S. for each year listed below.
 - 2023 _____
 - 2022 _____
 - 2021 _____

FOREIGN REPORTING (must be completed for each taxpayer separately including you, your spouse and all your dependants)

- Did you own or hold foreign property with an aggregate cost of CAD\$100,000 or more during the year? For example, did you own any foreign rental property or foreign stocks held in Canadian or U.S. broker accounts?
- Are you the beneficiary of a non-resident trust or have you loaned funds to a non-resident trust?

SALE OF PRINCIPAL RESIDENCE

- Any disposition of a property for which the total or partial exemption for principal residence is claimed must be reported on your tax return. If you sold a principal residence during the year, provide the following:
 - Address of property, proceeds of disposition, acquisition cost of property, renovations to the property, and year it was originally acquired.



T1 Checklist - 2023 SELF EMPLOYED

CHECKLIST FOR THE SELF-EMPLOYED	(page 1 of 2)	<input type="checkbox"/> Amount	GST\$
		Excluding	
		GST\$	
<i>NOTE: If registered for GST/HST, indicate the GST/HST received/paid in your listing below by item</i>			
<i>If registered for GST/HST indicate GST account number () & indicate if quick method election filed</i>			
REVENUE earned during the year →	<input type="checkbox"/>		
EXPENSES:			
Advertising	<input type="checkbox"/>		
Convention Expenses	<input type="checkbox"/>		
Insurance	<input type="checkbox"/>		
Interest	<input type="checkbox"/>		
Interest and Borrowing Charges	<input type="checkbox"/>		
Health Plan Premiums	<input type="checkbox"/>		
Home Office	<input type="checkbox"/>		
Square Footage of Home Office Space and Total Home Footage	<input type="checkbox"/>		
Rent or Mortgage Interest (not principal repayments)	<input type="checkbox"/>		
Property Tax	<input type="checkbox"/>		
Home Insurance	<input type="checkbox"/>		
Annual Utilities			
Heat	<input type="checkbox"/>		
Hydro	<input type="checkbox"/>		
Water	<input type="checkbox"/>		
Cable and Internet	<input type="checkbox"/>		
Telephone and Internet	<input type="checkbox"/>		
Maintenance and Repairs	<input type="checkbox"/>		
Leasing Costs	<input type="checkbox"/>		
Meals and Entertainment Expenses	<input type="checkbox"/>		
Automobile			
Own or Lease (indicate make of car, if leased - provide detail lease agreement if new in 2023)	<input type="checkbox"/>		
Was there a Change in the Tax Year? (details - i.e., disposals)	<input type="checkbox"/>		
If Lease, Lease Cost Per Month (indicate HST amount, if included)	<input type="checkbox"/>		
If Own, Interest Cost Per Month	<input type="checkbox"/>		



T1 Checklist - 2023 SELF EMPLOYED

CHECKLIST FOR THE SELF-EMPLOYED	(page 2 of 2)	Amount Excluding GST\$	GST\$
Odometer @ Beginning of Year	<input type="checkbox"/>		
Odometer @ End of Year	<input type="checkbox"/>		
Percentage of Business Use of Car	<input type="checkbox"/>		
Fuel Expenses	<input type="checkbox"/>		
Car Insurance	<input type="checkbox"/>		
Repairs and Maintenance	<input type="checkbox"/>		
Parking expenses	<input type="checkbox"/>		
Highway Tolls	<input type="checkbox"/>		
License and Registration	<input type="checkbox"/>		
Equipment Purchases subject to CCA			
Furniture and Equipment	<input type="checkbox"/>		
Computer Equipment	<input type="checkbox"/>		
Leaseholds (if rental property)	<input type="checkbox"/>		
Office Expenses			
Telephone and Fax	<input type="checkbox"/>		
Stationary Supplies	<input type="checkbox"/>		
Internet	<input type="checkbox"/>		
Professional Membership Dues/Fees	<input type="checkbox"/>		
Accounting Fees	<input type="checkbox"/>		
Legal Fees	<input type="checkbox"/>		
Salaries Paid (provide T4 Summary for 2023)	<input type="checkbox"/>		
Travel Expenses	<input type="checkbox"/>		
List other Expenses	<input type="checkbox"/>		



T1 Checklist - 2023 RENTAL PROPERTY INFORMATION

Did you purchase the property in the current year? [Yes/No]: _____ Shared with spouse? [Yes/No] _____ Personal use %: _____

Address: _____ Your partnership %: _____ Number of units: _____

Rental revenue earned during the year: _____

EXPENSES (enter total expenses, not prorated amounts)	TOTAL
Purchase Price Paid (split between land/building?)	
Advertising	
Insurance	
Mortgage Interest	
Repairs and Maintenance	
Condominium Fees	
Management and Administration Fees	
Automobile Expenses	
Office Expenses	
Legal, Accounting and other Professional Fees	
Property Taxes	
Salary, Wages and Benefits	
Travel	
Electricity, Hydro	
Water	
Gas	
Cable and Internet	
Security	
Landscaping/Snow removal	
Bank Charges	

Did you sell the property in the current year? [Yes/No]: _____ If yes, the please provide the following:

Proceeds of disposition (split between land/building)	
Purchase price (split between land/building)	
Capital cost allowance claimed in all prior years	



T1 Checklist - 2023 HOME OFFICE EXPENSE DEDUCTION

As an employee, you may be able to claim certain home office expenses (work-space-in-the-home expenses, office supplies, and certain phone expenses). For 2023, there is only one option: the **detailed method**.

Detailed method:

- If filing under the **detailed method**, we require that you provide us a completed and signed Form T2200, as well as details of your home office amounts paid supported by documents. You cannot claim any expenses that were or will be reimbursed by your employer.

- Eligible employees can claim the employment portion of actual amounts paid.

Common home office expenses may include the following:

- o Office supplies (if required by employer) _____
- o Cell phone (if required by employer) _____
- o Utilities (i.e. electricity, heat, water) _____
- o Rent _____
- o Internet (monthly home internet access fee) _____
- o Property taxes (commissioned employees only) _____
- o Home insurance (commissioned employees only) _____

- Mortgage interest cannot be claimed by either employees or commissioned employees, only by self-employed individuals.
- The portion of the workspace used for employment purposes compared to the total finished area of their home is used as a basis for calculating the employment portion of the home office expenses.
 - o What is the office space as a percentage of the total finished area of your home _____%