

ROLFE BENSON LLP - 2023 PERSONAL INCOME TAX CHECKLIST

PLEASE COMPLETE THIS FORM AND RETURN TO US
ALONG WITH YOUR TAX SLIPS/INFORMATION

IMPORTANT:

(1) To help reduce the use and waste of paper, a copy of your tax return will be provided in electronic format.

If you would like a paper copy select YES.

Yes ☐

(2) Please provide a copy of all family members' 2022 NOTICE OF ASSESSMENT/REASSESSMENT and a copy of the CRA statement showing the instalments paid on account for the 2023 year, as applicable.

PERSONAL INFORMATION (Questions 1 to 5 - Complete for every family member)

Name	Email address	(1)	(2)		(3)		(4)		(5)	
		e-Sign Return	Canadian Citizen		Elections Canada		Foreign Property		Foreign Trust	
		Yes	Yes	No	Yes	No	Yes	No	Yes	No
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Questions (tick boxes above):

(1) Would you like to receive your tax return for signing with e-Signature software? If yes, please provide all family members' email addresses.

(2) Are you a Canadian Citizen?

(3) Do you authorize the Canada Revenue Agency to give your name, address, date of birth and citizenship to Elections Canada to update the National Register of Electors?

(4) Did you own or hold foreign property at any time in 2023 where the total cost at any time was more than CAN \$100,000? (i.e. foreign bank accounts, shares in non-resident corporations, cryptocurrency, debt owed to you by a non-resident, interest in non-resident trust, intangible property rights, real estate outside of Canada)

(5) Did you ever loan or transfer funds or property to a non-resident trust or did you ever receive funds or property from, or have been indebted to, a non-resident in which you had or will have absolute or condition rights as a beneficiary, either directly or indirectly?

Please note - there are substantial penalties for failing to report information from question (4) and (5) on your tax return.

(6) Are you a U.S. person (U.S. citizen or Green Card holder)? Yes ☐ No ☐

(7) Did you sell real estate in 2023? (If yes, please provide details) Yes ☐ No ☐

(8) Did you stop living in your principal residence and rent it out in 2023? Yes ☐ No ☐

(9) Please ensure we have the full names and dates of birth for all children, dependents, and SINs if applicable: _____

PRIMARY CONTACT INFORMATION (Have you moved?)

Street Address _____ Home Phone _____

City _____ Province _____ Mobile Phone _____

I/We would like to register for the secure transfer of confidential, digital information via Rolfe Benson Portal.

Yes ☐ No ☐

EMPLOYMENT INCOME		
	Employment income and benefits	T4
	Commission income	T4A
	Payments from DPSP or profit sharing plan	T4A/T4PS
	Severance pay or retirement allowance	T4A
	Tips, casual wages or part-time salary	T4, T4A, pay slip or summary showing amount received

RETIREMENT INCOME		
	Old Age Security	T4A(OAS)
	Canada Pension Plan /Disability benefits	T4A(P)
	Other pension or superannuation	T4A
	RRSP annuity income	T4RSP
	RRIF annuity income	T4RIF
	Other annuity income	T4A
	Foreign pension income	Foreign reporting slip / withholding tax details

OTHER INCOME		
	Income from a trust/mutual fund	T3 details of income and cost base adjustments
	Interest, dividend, royalty and other	T5
	CERB, CESB, CRB, CRSB, CRCB, fees for service	T4A
	EI benefits	T4E
	Canada Savings Bond/other bond interest	T600/other
	Working income tax benefit	RC210
	Worker's comp/Social Assistance	T5007
	Foreign income	Foreign jurisdiction reporting slip / withholding tax details
	Partnership income: limited or non-active partners	T5013
	Rental income/loss	Statement of rental income and expenses or Form T776
	Capital gains/losses	Original cost, proceeds of sale (T3/T5/T5008, broker gain/loss report)
	Real estate disposition	Property address, year of acquisition, proceeds of disposition, statement of adjustment
	Alimony and support payments	Agreement details and amounts received
	Cryptocurrency transactions (i.e. Bitcoin)	Purchase/disposition details

SELF EMPLOYMENT INCOME		
	Business, professional or commission income	Details of all income and expenses or Form T2125
	Forgivable CEBA and CECRA Loans	Agreement details and amounts received
	Partnership income	Statement of partnership income and allocation or T5013.
	Farming	Details of all income and expenses or NISA Form
	Joint venture	Joint venture statements

DEDUCTIONS		
	FHSA	Contribution receipts
	RRSP	Contribution receipts
	RRSP rollovers or withdrawals	Details - including home buyers plan information
	Annual union, professional or like dues	T4 or receipts
	Childcare expenses	Details of payment/SINs where applicable
	Attendant care expenses	Receipts & details
	Employment expenses	T2200, details of expenses (i.e. auto, travel, entertainment)
	Carrying charges and interest expense	Details, purpose of loan & interest paid.
	Clergy residence deduction	T1223
	Alimony and maintenance paid	Agreement details & amounts paid
	Business investment losses	Details of investment in private corporation
	Moving expenses - selling and operating old residence	Details of move and all expenses
	Tax shelters	Bring or send details
	Other deductions	Bring or send details

TAX CREDITS		
	Spousal credit	Net income for spouse
	Disability credit (if 1st year of claim)	T2201
	Home accessibility tax credit - Costs to renovate your home to enhance mobility or reduce harm to a person eligible for the disability credit or 65 years or older	Provide expenses (i.e. wheelchair ramps, walk-in bathtubs, grab bars). (max \$20,000)
	Tuition fees	T2202 or TL11A for schools outside Canada
	Medical expenses	Receipts (prescriptions, dental, glasses etc).
	Donations	Official receipts
	Federal / Provincial Political contributions	Official receipts
	Interest on student loans	Statement of interest
	Venture capital credit	T5006, provide details
	Home buyer - 1st time buyer	Provide details
	Adoption expenses - each child under 18 years adopted in 2023.	Receipts from adoption organization
	Early educator school supply tax credit - Teacher or early childhood educator paid for eligible supplies used in the school or regulated child care facility.	Provide expenses (i.e. paper, flashcards, art supplies, stationery, games, puzzles, books). (max \$1,000)
	Multigenerational Home Renovation Tax Credit	Receipts for renovation expenses

FOREIGN REPORTING		
	Property held in an account with a Canadian Securities dealer	For each investment, country, FMV at each month end, income and gain/loss realized
	Foreign assets including cash, real estate, investments in foreign companies (including private foreign companies), Cryptocurrency (i.e Bitcoin).	For each property max cost in the year, cost at year end, income and gain/loss realized
	Transactions with foreign trusts	Provide details
	Foreign tax paid (credit)	Copy of foreign tax return and tax assessment

Comments / list of items to be sent at later date: _____