Hauley Accounting Services Inc. Personal Income Tax Checklist 905-898-1421 ~ TF 1-855-222-4274 ~ Fax 905-898-2327

Page 1

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Personal Income Tax Checklist Tax Year 2023 905-898-1421 ~ TF 1-855-222-4274 ~ Fax 905-898-2327 Page 2 INVESTMENT INFORMATION: ___ Details of all investment disposals during tax year including information to support original purchase price + cost adjustments, obtain: Gain/Loss Report from your Investment Advisor and Year End Reporting Package; Allowable business investment loss (ABIL) - if you have loaned money or invested in a Canadian small business and the company has either ceased operations or gone bankrupt, you may be entitled to a deduction for your investment. Please provide details. **RENTAL INCOME:** ___ Full address, number of units Date acquired, purchase price, or sold, need lawyer's reporting letter. Revenue & expenses, including mortgage interest, insurance, property taxes, etc. Percent of personal usage, if any **EXPENSES** - Self-employment, Employment or Commission: YOU NEED TO KEEP RECEIPTS AS CRA MAY REQUEST THEM __ T2200 Statement of allowable expenses signed by employer _____ Meals & entertainment _____ Travel, promotion, conferences, dues, communications, supplies, etc. ____ Vehicle - vehicle mileage log w/total kms, total business kms + operating expenses, lease costs, loan interest, purchase/sale price if bought/sold during tax year Office in home - total square footage of home & square footage of office used for business use. Mortgage interest, rent, property taxes, condo fees, utilities, insurance, general repairs & maintenance, etc. __ Details of capital asset purchases in year, eg. vehicles, equipment, computers, etc T2200S - COVID Office in Home Deduction - Provide # of days at home _____ RRSP receipts **DEDUCTIONS:** _____ First Home Savings Account receipts (FHBA) ____ Child care w/supporting receipts & SIN of caregiver Union / professional dues _____ Moving expenses, if moved 40 kms closer to workplace ______ Support payments w/copy of agreement ______ Accounting fees / Advisor management fees ____ Legal fees to collect salary, alimony, support ____ Investment / business interest expense _____ Tax shelter deductions - tax slips & tax reporting package Property taxes paid - 2022 final property tax bill Rental payments - Landlord's name and amount paid during 2023 **NB: Please submit receipts.** _____ Charitable & political donation receipts **TAX CREDITS:** ____ Adoption costs ____ Medical / dental / group insurance cost / attendant care expenses w/receipts TIP: Ask your pharmacy to give you summary of your medications for the year ______ Tuition fee receipts, w/dependents income & signatures (T2202)

_____ Disability credit form (T2201) for self or dependent (first time claims)

_____ Caregiver Deduction for Supporting Disabled Child or Parent

Home renovations for senior or disabled for friendlier/safety access

Student loan interest statement

____ Trades people's tools signed by employer (T2200)

First time home buver(s)

_____ Digital News Subscription Cost of Electronic Canadian Subscriptions (Max \$500)

_____ Home renovations to allow Parents, adult child, to establish a secondary unit in the home

_____ Teacher / Early Childhood Educator school supplies paid (Max \$1,000)