

## Personal Tax Checklist

Tax Year: \_\_\_\_\_

Complete this T1 checklist and attach all applicable slips, receipts, and other supplemental information required.

### Client Portal

Do you have a client portal?  Yes  No

If yes, you can upload this checklist and the attached information to your client portal:  
<https://wilkinsonrogers.cchifirm.ca/clientportal/account/logon>.

If you have not been set up with a client portal but would like one, please email [office@wilkinsonrogers.com](mailto:office@wilkinsonrogers.com).

If you prefer paper documentation and do not wish to be set up on a client portal, please indicate so by checking the box below.

I prefer paper documentation.

You can drop off this checklist with your paper documentation to the office, 214-700 Richmond Street, London ON.

### 1. Personal Information

Your Name: \_\_\_\_\_

Your SIN: \_\_\_\_\_

Address: \_\_\_\_\_  
 \_\_\_\_\_

Date of Birth: \_\_\_\_\_

mm/dd/yyyy

#### Phone Numbers:

Mobile: \_\_\_\_\_

Home: \_\_\_\_\_

Work: \_\_\_\_\_ Ext. \_\_\_\_\_

Email Address: \_\_\_\_\_

Preferred Method of Communication:  Email  Phone: \_\_\_\_\_

Citizenship:  Canadian  Other: \_\_\_\_\_

#### Marital Status:

Single  Married  Common-law  Separated  Divorced  Widowed

If marital status changed during the year, provide date of change:

Spouse's Name: \_\_\_\_\_

Spouse's SIN: \_\_\_\_\_

Spouse's Date of Birth: \_\_\_\_\_

#### Spouse's Phone Numbers:

Mobile: \_\_\_\_\_ Home: \_\_\_\_\_

Work: \_\_\_\_\_ Ext. \_\_\_\_\_

Spouse's Email Address: \_\_\_\_\_

### 2. Residence

Province/Territory of residence on December 31: \_\_\_\_\_

Did you move during the year?  Yes  No

Did you immigrate to Canada or emigrate from Canada during the year?  Yes  No

If yes, provide the date into Canada: \_\_\_\_\_

Or the departure date: \_\_\_\_\_

### 3. Foreign Reporting

Did you own or hold foreign property (including real estate) with a total cost between \$100,000 and \$250,000 CAD at any time during the year?  Yes  No

Did you own or hold foreign property (including real estate) with a total cost of more than \$250,000 CAD at any time during the year?  Yes  No

### 4. Dependents

Name	Relationship	Date of Birth	SIN	Physically or Mentally Infirm	Income	Child Care Expenses

If separated, are you claiming an eligible dependent?  Yes  No

### 5. General Income/Deductions

T-slips (T4, T4A, T4E, T5007)  Yes  No

Did you receive any of the special emergency benefits (CRSB, CRCB)?  Yes  No

Employment income or taxable benefits not shown on T4 slip: \_\_\_\_\_

If applicable, provide the amount paid for union and professional dues as well as the names of the organizations.  
\_\_\_\_\_

Do you have any income from the sharing economy such as Airbnb, VRBO, Uber, etc.?  Yes  No

List of childcare expenses, with receipts, for each child?  Yes  No

List of spousal support payments made or received?  Yes  No

List of deductible employment expenses?  Yes  No

Did you travel or relocate for work during the year?  Yes  No

Is a signed Form T2200 (required for employment expenses) attached?  Yes  No

Did you work at home for any part of the tax year without a T2200 being signed?  Yes  No

If yes, please enter the number of days you worked at home: \_\_\_\_\_

Or claim max deduction of \$500 \_\_\_\_\_

RRSP contribution receipt?  Yes  No

### 6. Pension Income

T-slips (T4A, T4RIF, T4(OAS), etc.)  Yes  No

### 7. Investment Income/Deductions

T3 – Income from Trust allocations?  Yes  No

T5 – Investment income?  Yes  No

- T4PS – Income from profit sharing plans? Yes No
- T5013 – Partnership income? Yes No
- T5008 – Income from securities transactions/ Realized gain/loss report? Yes No
- Did you dispose of property or investments (including cryptocurrency) during the year (excluding residence designated as a principal residence) at any time in the year? Yes No  
If yes, provide details (i.e., broker tax reporting package).
- Interest paid to earn investment income? Yes No  
If yes, enter amount: \_\_\_\_\_
- Management fees paid? Yes No  
If yes, provide statement.
- Did you dispose of your principal residence during the year? Yes No  
If yes, Proceeds: \_\_\_\_\_ Date acquired: \_\_\_\_\_
- Did you dispose of any real property other than principal residence during the year? Yes No  
If yes, provide the legal package and the following:  
Proceeds: \_\_\_\_\_ Adjusted Cost Base: \_\_\_\_\_

### 8. Self-Employment/Business Income

- Financial statement(s)/schedule of revenue and expenses attached? Yes No
- Did you receive the CEBA in a previous tax year? Yes No
- Did you repay the CEBA during the year? Yes No  
(Note that the full balance must be repaid by December 31, 2023 to be eligible for the grant.)
- If you used a vehicle for business, are the vehicle expenses and both total and business mileage attached? Yes No
- If you used a portion of your home for business, are the homes expenses and both total and business square footage attached? Yes No
- Is a list of all asset additions and disposals (including cars, equipment, etc.) attached? Yes No

### 9. Rental Income

- Did you own rental property? Yes No  
If yes, attach statement of rental income and answer the next question.
- Did you also live in the rental property (in which case no CCA should be claimed)? Yes No

### 10. Other Credits

- T2202A – Tuition amount paid for you? Yes No
- T2202A – Tuition amount claimed on transfer from dependent (second page signed)? Yes No
- Receipt or amount for your student loan interest? Yes No
- Receipts/listing of all medical expenses paid in the year for you, your spouse, and dependents? Yes No
- Receipts/listing of alterations to your home to enhance mobility/safety? Yes No
- Receipts for seniors' home safety expenses? Yes No
- Receipts for charitable donations or donations made by way of gifting an item in kind? Yes No
- Receipts for political contributions? Yes No
- Receipts for digital news subscription? Yes No
- Receipts for accommodation in Ontario? Yes No  
(Note: receipt must show the HST paid to be valid)

List of eligible teaching supplies purchased (for teachers and early childhood educators only)? Yes No

Public transit passes for travel for Ontario seniors (receipts/details)? Yes No

Did you purchase your first home this year? Yes No

Did you pay property taxes/rent in the year? Yes No

If yes, provide the following:

Amount paid: \_\_\_\_\_ Landlord/Municipality: \_\_\_\_\_