



2022 Personal Tax Checklist

To assist us in the preparation of your 2022 T1 Income Tax Return, we have prepared the following tax checklist. Please review this list for all possible applicable items relating to your particular circumstances.

Client Name: _____

SIN: _____ Marital Status: _____ Date of Change (if applicable): _____

Spouse and Dependents:

<u>Names</u>	<u>SIN</u>	<u>Birthdates</u>	<u>Net Income</u>

INCOME

Personal

- T4, Salaries and Employment Income
- T4A(P) - Canada Pension Plan
- T4A(OAS) - Old Age Security
- T4A - Other Income
- T4RSP – RRSP Income
- T4RIF – RRIF Income
- T4E – Employment Insurance Benefits
- T5007 – WSIB/Social Services
- T5018- (Subcontractors income)

Investment

- T3, T5, Interest, Dividends and Mutual Funds
- T5008 - Stmt. Of Security Transactions
- T600 - Canada Savings Bonds
- Foreign Income
- Annuities
- Rental Income and Expenses
- T5013 – Limited Partnership Income (Loss)
- Capital Gains/Losses (Full details required)
- T4PS – Employee-Profit-Sharing Plan

Other

- Alimony Received
- Scholarships/Bursaries
- Other – Specify (no T slips received)
- Foreign pensions, other investments

Self Employment

- Business Income and Expenses
- Professional Income and Expenses
- Commission Income and Expenses
- Internet Business Activities (Details)

DEDUCTIONS AND CREDITS

Refundable and Non-Refundable Credits

Married Amount-Spouse's Net Income \$ _____

(if spouse is doing his or her own return)

Eligible Dependant Income \$ _____

(If dependant doing his or her own return)

T2201 – Disability Deductions

T2202/TL 11 – Tuition Fees/Education Credit for Dependant- Dep. Net Income \$ _____ (if Dependant doing his or her own return)

Interest on money borrowed to purchase investments

Interest Paid on Student Loans

Medical receipts

Child Care Expenses (Full details required)

Charitable Donations

Home buyers tax credit

Attendant Care Expenses

Educator School Supply Tax Credit

Home accessibility Tax Credit (up to \$20k) in relation to a renovation of your home to enhance mobility for seniors and DTC eligible.

Other Deductions

RRSP Receipts (Mar 2,2022 to Mar 1, 2023)

Employment Expenses (Full details and T2200 required)

Union, Professional Dues

Spousal Support / Alimony Paid

Adoption Expenses

days working from home due to Covid-19

TL2 – Meals and Lodging

Tools acquired by tradespersons and eligible apprentice mechanics.

Legal expenses to obtain a pension

Moving Expenses (Full details required)

Clergy residence deduction

Employment Insurance Benefit Repayments

Other Credits

Political Contribution Receipts

Rent /Property Tax Paid (OTB) Staycation

Other Information

Disposition of your home or other real property

2021 NOA & 2022 Instalment Payments

Please indicate whether you authorize Canada Revenue Agency to provide your name, address, and date of birth to Elections Canada to update your information for the National Register of Electors.

Taxpayer Yes / No

Spouse Yes / No