

**PLEASE CHECK OFF THE ITEMS BELOW THAT ARE APPLICABLE TO YOUR 2023 PERSONAL TAX RETURN. RETURN THIS SCHEDULE TO OUR OFFICE TOGETHER WITH ALL COPIES OF THE RELEVANT DOCUMENTATIONS AS FOLLOWS:**

INCOME	
<input type="checkbox"/> T4 Employment slips and any other taxable benefits not reported on the T4 <input type="checkbox"/> T5 Investment slips <input type="checkbox"/> T4A(OAS): Old Age Security <input type="checkbox"/> T4AP: CPP Benefits <input type="checkbox"/> Other information slips (T3, T4A, T4E) <input type="checkbox"/> Pension income (Canada & Abroad) <input type="checkbox"/> Social Assistance payments <input type="checkbox"/> Workers' Compensation Benefits <input type="checkbox"/> Interest and dividends <input type="checkbox"/> Capital gains/losses record <input type="checkbox"/> Sale of real estate (proceeds, adjusted cost basis, outlays) <input type="checkbox"/> Gain / loss summary of investments	<input type="checkbox"/> Elected split pension <input type="checkbox"/> Rental income/expenses (attached worksheet) <input type="checkbox"/> RRSP withdrawals <input type="checkbox"/> Spousal support payments received <input type="checkbox"/> Child support payments received <input type="checkbox"/> Partnership income/loss (T5013) <input type="checkbox"/> Professional income/expenses (attached worksheet) <input type="checkbox"/> Commission income/expenses (attached worksheet) <input type="checkbox"/> Self-employment income/expenses (attached worksheet) <input type="checkbox"/> Farming income/expenses <input type="checkbox"/> Fishing income/expenses <input type="checkbox"/> GST Rebates received <input type="checkbox"/> Foreign Income <input type="checkbox"/> Stock options exercised
DEDUCTIONS	
<input type="checkbox"/> RRSP Contributions (up to March 1, 2022) <input type="checkbox"/> Union & professional dues <input type="checkbox"/> Childcare expenses <input type="checkbox"/> Moving expenses (if >40km closer to work) <input type="checkbox"/> Child support payments made <input type="checkbox"/> Spousal support payments made <input type="checkbox"/> Investment carrying charges – interest, account fees, counsel fees	<input type="checkbox"/> Exploration and Development expenses (T101) <input type="checkbox"/> Northern residents' deduction <input type="checkbox"/> Declaration conditions of employment (T2200) <input type="checkbox"/> Employment expenses <input type="checkbox"/> Automobile logs <input type="checkbox"/> Home office receipts and summaries
TAX CREDITS	
<input type="checkbox"/> Medical expense receipts <input type="checkbox"/> Volunteer firefighter's statement <input type="checkbox"/> Search and rescue volunteers' statement <input type="checkbox"/> First-time home buyer – house purchase documents <input type="checkbox"/> Adoption expenses <input type="checkbox"/> Fertility treatment expenses <input type="checkbox"/> Disability tax credit application (T2201) – self or dependent <input type="checkbox"/> Eligible Educator School supply receipts and employer attestation	<input type="checkbox"/> Tuition receipts (T2202A, TL11A, TL11B, and/or TL11C) – or those forms signed by the child to transfer to the parent <input type="checkbox"/> Interest paid on student loans <input type="checkbox"/> Charitable donation receipts <input type="checkbox"/> Political donation receipts <input type="checkbox"/> Foreign taxes paid <input type="checkbox"/> Dates spent in the USA (If you vacation extensively in the USA; this will help us determine if you have any US filing requirements)
<p>If your prior year return was completed by another firm, please provide a copy of the tax return filed.</p>	