



## 2023 TAX CHECKLIST

- 2022 Notice of assessment and all other correspondence with CRA
- Changes in personal status: new surname, address, marital status, children, etc.
- T4s, T4As, T4Es
- T3s, T5s, T5008s, T5013s
- Sole proprietor business revenue and expenses - **[www.wcocpa.ca/forms](http://www.wcocpa.ca/forms)**
- Spousal/child payments or receipts, details of agreements
- Childcare expenses
- List of all dependents, their birth dates, SINs, and income
- Sale of stocks, bonds, real estate: provide original cost, sale price, and acquisition year. A summary can be obtained from your financial institution upon request.
- Stock options exercised
- Rental property revenue and expenses - **[www.wcocpa.ca/forms](http://www.wcocpa.ca/forms)**
- Misc. income, bursaries, tips, director, and executor fees
- RRSP contributions and home buyer statements
- Moving costs, if due to employment/business
- Commissioned salesperson - **Include T2200 Declaration of Employment Conditions**
- Investment or business loan interest
- T2202A tuition receipts - **Download from school's website**
- Statement of student loan interest paid
- Charitable donations
- Medical receipts
- Schedule of employment expenses – **Include T2200 Declaration of Employment Conditions**
- Union dues paid
- Tax instalments paid
- First time home buyer
- Volunteer firefighter
- Property taxes or rent paid and landlord's name (students can claim when at school)
- T1135 filing requirements – details of specified foreign property owned at any time in 2023 with a cost of more than \$100,000 CAD (property situated outside Canada, non-resident shares, partnership interests or debts). Failure to disclose specified foreign property can result in significant penalties imposed by CRA.**