



2023 T1 PERSONAL INCOME TAX RETURN CHECKLIST

(One checklist per couple)

Name: _____ Spouse/Partner Name: _____

Address: _____ (Street, City/Town, Province, Postal Code)

2023 Marital Status (Circle One): Married / Common-Law / Widowed / Divorced / Separated / Single

If marital status changed during the year, date of change: _____ (Month / Day) New Status: _____

List any dependents who were born/adopted in 2023: DOB _____ Name _____

(New) Please Provide Your Residency Status (Circle One Below):

Resident / Factual Resident / Non-Resident / Immigrant (Arrived) / Emigrant (Left) / Deemed Resident

(New) Please Provide Your **Spouse** Residency Status (Circle One Below):

Resident / Factual Resident / Non-Resident / Immigrant (Arrived) / Emigrant (Left) / Deemed Resident

If you would like to use CRA direct deposit, provide a void cheque or the following banking information:

(Provide only if banking information has changed during the year or for new registration):

Branch _____ Institution _____ Account Number _____
(5 digits) (3 digits) (maximum 12 digits)

Did you sell your principal residence during the year?

Yes No

If Yes, please provide the gross sale proceeds and year of purchase: Proceeds \$ _____ Year: _____

(New) Did you sell any other real estate, including any rental property and recreational property during the year?

Yes No

If Yes, please provide sale reporting documents from the lawyer and original purchase documents and costs of improvements completed during ownership.

Do you live on a farm or in a rural community outside of Rocky View County? Yes No

			IF YES PLEASE PROVIDE:
New Bare Trust Reporting. Are you listed as a legal owner for any assets for which you do not hold a beneficial ownership interest? (Land, real estate, including co-signing for a mortgage, bank accounts, investment accounts, In-Trust account)	Yes	No	New T3 Trust reporting rules for Bare Trusts may apply to you. Check out our website blog page , and contact our office for additional details.
Do you have assets outside of Canada, including foreign stocks with a combined cost in excess of \$100,000 CDN (T1135)?	Yes	No	A listing of all foreign owned assets during the year including value of assets. Please provide the Foreign Property Report from your investment advisor.
Have you spent more than 120 days in United States in any of the last 3 years?	Yes	No	Please provide the number of days per calendar year: 2023_____2022_____2021_____
If you have spent more than 120 days in the United States in the last 3 years, would you like GH&A to prepare IRS form 8840 if required?	Yes	No	
Do you and your spouse authorize CRA to provide information to Elections Canada?	Yes	No	

INCOME			IF YES PLEASE PROVIDE:
Employment income	Yes	No	T4 slips issued by employer
Pension/annuity income/commission	Yes	No	T4A / T4A(P) / T4A(OAS) slips
Foreign pension income	Yes	No	Country, type (company/government), currency
RRSP/RRIF income	Yes	No	T4RSP / T4RIF slips
Interest/dividend/investment income/mutual fund income	Yes	No	T3 / T5 / T5013 slips, details of other investment income
Capital gains/losses from sale of stocks, mutual funds, bonds, cryptocurrency, real estate, etc.	Yes	No	1. Realized Gain/Loss Report 2. T5008
Can we contact your investment advisor?	Yes	No	Name: _____ Phone #: _____ Email: _____
Self-employment income (including rental, business, farming)	Yes	No	Details of income and expenses for year. Also provide invoices for equipment purchases and/or dispositions
Do you have a personal business GST return that you need GH&A to file?	Yes	No	Provide GST return information including CRA access code (if available).
Are you providing electronic data for the above noted self-employment income?	Yes	No	Program Name / Version: _____ Username: _____ Password: _____

OTHER INCOME			IF YES PLEASE PROVIDE:
Covid-19 related support repayments (CRB, CRSB, CRCB, and provincial supports)	Yes	No	T4A, T4E, or other documentation of funding received
Other income	Yes	No	Details or slips (Workers Compensation T5007, Employment Insurance T4E, Spousal Support Payments , etc.)
Sale of real estate	Yes	No	Sale reporting documents from the lawyer and original purchase documents.

DEDUCTIONS AND CREDITS			IF YES PLEASE PROVIDE:
RRSP contributions	Yes	No	Tax receipts – may include first 60 days of current year (Contributions to February 29, 2024)
Home Buyers Plan (HBP) or Lifelong Learning Plan (LLP)	Yes	No	Amount of any HBP or LLP repayment and statement from CRA
(New) FHSA (First Home Savings Account) contributions	Yes	No	T4FHSA
Union or professional dues	Yes	No	Tax receipts (if not listed on T4)
Childcare/summer camp for your children	Yes	No	Official receipts
First-time home buyer tax credit	Yes	No	Date of when home was purchased
Moving expenses	Yes	No	Details – must move at least 40km closer to work
Investment income expenses	Yes	No	Interest expenses, management fees, etc.
Spousal support payments made	Yes	No	Details of payments made
Home office/Employment expenses	Yes	No	Details of employment expenses (You Must Provide Receipts) – please also include signed T2200 received from your employer
Student loan interest	Yes	No	Tax receipt – Canada Apprentice Loans are now eligible
Tuition fees for self	Yes	No	T2202/T2202A
Tuition fees of dependent who wishes to transfer	Yes	No	T2202/T2202A signed by student + copy of student's tax return if not prepared by us
Medical expenses (including prescriptions, dental, health, vision, insurance premiums)	Yes	No	Receipts (You Must Provide Receipts) – contact your pharmacy or insurance provider for a summary of your prescriptions for the year. As well, please provide a summary of any travel over 40 km one-way for medical purposes, including dates and KM driven
Attendant care or nursing home costs	Yes	No	Provide receipts and/or annual statement
Disability Tax Credit	Yes	No	If you feel you are eligible, have your doctor complete T2201 and send to CRA for approval

Canada Caregiver Credit (care provided for an adult dependent/parent)	Yes	No	If you provide care for an infirm dependent either in your home or not, provide certified letter from doctor and net income of dependent
Charitable donations	Yes	No	Tax receipts (You Must Provide Receipts)
Political donations (Federal and Provincial)	Yes	No	Tax receipts (You Must Provide Receipts)
School supplies (Teachers Only)	Yes	No	Receipts for supplies (You Must Provide Receipts)
Volunteer firefighter or search and rescue	Yes	No	Letter of hours volunteered
Digital News Subscription	Yes	No	Receipts from news agency (You Must Provide Receipts)

PLEASE VISIT THE RESOURCES PAGE ON OUR WEBSITE FOR ADDITIONAL INFORMATION AND DOCUMENTS TO ASSIST WITH THE PREPARATION OF YOUR 2023 PERSONAL INCOME TAX RETURN

<https://gh-a.com/resources/personal-tax-return-information-checklists.html>

IMPORTANT: Gregory, Harriman & Associates LLP is authorized to retain the current personal and/or financial information and historical personal and/or financial information for as long as it may be required by legislation, i.e., the Income Tax Act, and/or as may be required to document future support program applications and/or future external financing applications and doing so thereafter for a reasonable period of time. I acknowledge my right to access the applicable personal and financial information collected by Gregory, Harriman & Associates LLP by contacting the Privacy Officer.

Name: _____

Spouse: _____

Signature: _____

Signature: _____

How would you like to sign your 2023 Personal Tax Return(s)?

Adobe Sign EMAIL: _____ Sign at Office Express Post (\$40.00 fee)

EMAIL: _____

To ensure the security of sensitive financial information being emailed to our office, we recommend using our secure client portal (E-Courier) or password protecting attachments. Please contact mailbox@gh-a.com if you would like to set up an E-Courier account.

IMPORTANT: Personal Income Tax Returns will NOT be filed with CRA without payment and required signatures.

Canada's Anti-Spam Legislation (CASL)

In accordance with Canada's Anti-Spam legislation ("**CASL**"), GREGORY, HARRIMAN & ASSOCIATES LLP ("**GHA**") is requesting your consent to send you Commercial Electronic Messages (CEM) including emails and other forms of digital messaging. These communications may include:

- General communications relating to the services GHA is providing to you, including file preparation questions and similar communications; ("**Services Related Communications**");
- invoices, statements, or other communications relating to the services GHA is providing to you ("**Billing Related Communications**") and
- information such as important tax updates, information on other services and newsletters from **GHA** ("**Firm & Update Communications**")

By selecting "**YES**", you are opting-in to receive Commercial Electronic Messages from GREGORY, HARRIMAN & ASSOCIATES LLP for the above purposes. You can withdraw your consent at any time by contacting the Office Administrator.

Please review and answer the following options:

Please send me Commercial Electronic Messages to the email noted below about GREGORY, HARRIMAN & ASSOCIATES LLP'S "**Services Related Communications**".

YES: _____ NO: _____

Please send me Commercial Electronic Messages to the email noted below about GREGORY, HARRIMAN & ASSOCIATES LLP'S "**Billing Related Communications**".

YES: _____ NO: _____

Please send me Commercial Electronic Messages to the email noted below about GREGORY, HARRIMAN & ASSOCIATES LLP'S "**Firm & Update Communications**".

YES: _____ NO: _____

*If you wish to stop receiving only our "Firm & Update Communications" but would like to continue receiving all other Services Related Communications, kindly respond with "**STOP FIRM & UPDATE COMMUNICATIONS**" to mailbox@gh-a.com or click on the unsubscribe link provided in the email communication.*

*If you opt out of "**Services Related Communications**", please contact the Office Administrator either by phone at (403) 934-3176 or email at mailbox@gh-a.com to discuss other communication options.*

*If you opt out of "**Billing Related Communications**", all invoices and statements relating to the services provided by GHA will be delivered in paper format (Canada Post).*

*If you opt out of "**Firm & Update Communications**", this information will NOT be delivered in paper format but will be available on our website.*

Name: _____

Email: _____

Signature: _____

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GHA
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