



GREGORY
HARRIMAN
& ASSOCIATES LLP
CHARTERED PROFESSIONAL ACCOUNTANTS

2022 T1 PERSONAL INCOME TAX RETURN CHECKLIST

(One checklist per couple)

Name: _____ Spouse/Partner Name: _____

Address: _____

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

List any dependents who were born/adopted in 2022: DOB _____ Name _____

Do you, your spouse or any of your dependents qualify for the Disability Tax Credit? Yes No

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

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

Did you sell your primary residence in the tax year? Yes No Proceeds _____ Year Purchased _____

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

			IF YES PLEASE PROVIDE:
Have you added someone to the land title, or have you been added to the land title of a residential property, for estate planning purposes only (either in 2022 or a previous year)?	Yes	No	Please contact our office to discuss the potential filing of form UHT-2900
Do you have assets outside of Canada, including foreign stocks with a combined cost in excess of \$100,000 Canadian (T1135)?	Yes	No	A listing of all foreign owned assets during the year including value of assets
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: 2022 _____ 2021 _____ 2020 _____
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:
Salary/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	Yes	No	T5 / T5013 slips, details of other investment income
Trust/mutual fund income	Yes	No	T3 slips
Self-employment income (i.e.: rental, business)	Yes	No	Details of income and expenses for period.
Do you have a personal business GST return that you need GH&A to file?	Yes	No	GST remittance returns for period.
Are you providing data for above noted self-employment income?	Yes	No	Program Name / Version: _____ Username: _____ Password: _____
Capital gains/losses from sale of stocks, mutual funds, bonds, cryptocurrency, real estate, etc.	Yes	No	1. Trading Summary for each brokerage account 2. Realized Gain/Loss Report 3. T5008
Can we contact your investment advisor?	Yes	No	Name: _____ Phone Number: _____ Email: _____

OTHER INCOME			IF YES PLEASE PROVIDE:
Covid-19 related support payments (CRB, CRSB, CRCB, and provincial supports) or repayments	Yes	No	T4A, T4E, or other documentation of funding received
Other income	Yes	No	Details or slips (Workers Compensation T5007, Employment Insurance T4E, etc.)
Sale of real estate	Yes	No	Statement of adjustments on closing from law firm and accumulated cost of property

DEDUCTIONS AND CREDITS			IF YES PLEASE PROVIDE:
RRSP contributions	Yes	No	Tax receipts – may include first 60 days of current year
Home Buyers Plan (HBP) or Lifelong Learning Plan (LLP)	Yes	No	Amount of any HBP or LLP repayment and statement from CRA
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.
Home Office/Employment expenses/Working from home deduction	Yes	No	Details – please include signed T2200 or T2200S, # of days working from home due to Covid-19 # Days: _____

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	Yes	No	Official receipts – contact your pharmacy or insurance provider for a summary for the year. As well, please provide a summary of any travel over 40 km one-way for medical purposes
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
Political donations	Yes	No	Tax receipts
Teaching supplies	Yes	No	Receipts
Volunteer firefighter or volunteer search and rescue	Yes	No	Letter of hours volunteered
Digital News Subscription	Yes	No	Receipts
Attendant care or nursing home costs	Yes	No	Provide receipts and/or annual statement

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 2022 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.