

# Towler and Associates, CPAs

#150 - 233 West 1st Street, North Vancouver, BC, V7M 1B3

## 2023 Personal Income Tax Checklist

Name: \_\_\_\_\_ Email: \_\_\_\_\_  
Address: \_\_\_\_\_ Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

**Please Note: We need to receive your information by April 2nd to ensure that we can complete your return by April 30th.**

To assist our staff in preparing your personal tax return, please group your tax information as below.

Please inform us if any of your info has changed from the prior year, e.g.: changes to address, dependants, marital status etc.

Did you sell any real estate during the year, including your home?

- If you did, we will need to know the dates of acquisition and sale, proceeds & description of property? Use "notes" spaces below

Has your son/daughter started college; are you taking care of an elderly parent?

If filing separately from your spouse/common-law spouse, what is her/his approx. net income, name, date of birth and SIN

### Tax information required to complete your tax return. Which situation applies to you?

\* **General tax information for most taxpayers - Complete sections A & B**

\* **If you are eligible to claim employment expenses (your employer has issued a T2200) - Also complete Sections D & G**

\* **If you have made RRSP contributions or withdrawals - Also complete Section C**

\* **If you have self-employed income and expenses - Also complete sections E, F, G & H**

\* **If you have to file a GST return (Bring your GST 34-2 form if you have received one) - Also complete section J**

\* **If you have rental and expenses to report - Also complete sections G & I**

### Section A

#### TAX SLIPS & INFORMATION

Y/N #slips \_\_\_\_\_ T3's - from trusts  
Y/N #slips \_\_\_\_\_ T4's - from employer  
Y/N #slips \_\_\_\_\_ T4A's - pension & annuity income  
Y/N #slips \_\_\_\_\_ T4 - (OAS) - Old Age Security  
Y/N #slips \_\_\_\_\_ T4A (P) - Canada Pension Plan  
  
Y/N #slips \_\_\_\_\_ T4E's - for EI benefits  
Y/N #slips \_\_\_\_\_ T5's - from bank or broker  
Y/N #slips \_\_\_\_\_ T5008 - Statement of securities transactions  
Y/N #slips \_\_\_\_\_ T5013 Partnership  
Y/N #slips \_\_\_\_\_ T2202 - Tuition  
Y/N #slips \_\_\_\_\_ Additional T slips -T5007, T5008, etc.  
Y/N #slips \_\_\_\_\_ Pension adjustment (PA) slips  
Y/N #slips \_\_\_\_\_ Foreign Pension info & receipts  
Y/N #slips \_\_\_\_\_ Stmt of Gain & Loss on investment accounts  
Y/N #slips \_\_\_\_\_ Stmt of Investment Counsel Fees  
Y/N #slips \_\_\_\_\_ Any income producing foreign property held  
Y/N #slips \_\_\_\_\_ Union or professional dues

\*\*2023 Tax Instalments Paid \_\_\_\_\_

### Section B

#### OTHER INCOME & EXPENSES

\$ \_\_\_\_\_ Alimony or separation payments or income  
\$ \_\_\_\_\_ Child care costs (Provide details)  
\$ \_\_\_\_\_ Child Support  
\$ \_\_\_\_\_ Donations (receipts required)  
\$ \_\_\_\_\_ Medical/Dental (receipts and/or doctor prescript)  
\$ \_\_\_\_\_ Tuition fees (over \$100 each) (T2202/TL11)  
\$ \_\_\_\_\_ Interest paid on investment loans  
\$ \_\_\_\_\_ Moving expenses (details required)  
\$ \_\_\_\_\_ Qualifying CND Digital Subscription (max \$500)

### Section C

#### RRSP

\$ \_\_\_\_\_ RRSP - Contribution slips  
\$ \_\_\_\_\_ T4RSP - Withdrawal slips  
\$ \_\_\_\_\_ T4RIF - Receipt slips  
\$ \_\_\_\_\_ Home Buyer or LLLP repayment

### Section D

#### EMPLOYMENT EXPENSES - T777

\*\*Please remember to bring your completed & signed T2200 form filled out by your employer\*\*

\$ \_\_\_\_\_ Accounting & legal (Commission income only)  
\$ \_\_\_\_\_ Advertising & promo (Commission income only)  
\$ \_\_\_\_\_ Auto expense (**see AUTO EXP.**)  
\$ \_\_\_\_\_ Parking  
\$ \_\_\_\_\_ Entertainment (Commission income only)  
\$ \_\_\_\_\_ Office expenses  
\$ \_\_\_\_\_ Supplies  
\$ \_\_\_\_\_ Travel (Food, Lodging, Transportation)  
\$ \_\_\_\_\_ Telephone and internet

#### Employment - Eligible Home Office Expenses:

Business portion based on office feet<sup>2</sup> /total house feet<sup>2</sup>

Sq. feet business area: \_\_\_\_\_ Sq. feet total \_\_\_\_\_  
\$ \_\_\_\_\_ Electricity  
\$ \_\_\_\_\_ Heat  
\$ \_\_\_\_\_ Maintenance  
\$ \_\_\_\_\_ Insurance (commission paid employees only)  
\$ \_\_\_\_\_ Property Tax (commission paid employees only)  
\$ \_\_\_\_\_ Rent

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## Section G

### AUTO EXPENSES

Make \_\_\_\_\_ Model \_\_\_\_\_ Year \_\_\_\_\_

Km Business Use: \_\_\_\_\_ Km Total: \_\_\_\_\_

\$ \_\_\_\_\_ Car allowance received

\$ \_\_\_\_\_ Fuel (gas & oil)

\$ \_\_\_\_\_ Insurance (ICBC) + \_\_\_\_\_

\$ \_\_\_\_\_ Loan interest

\$ \_\_\_\_\_ Lease payments

\$ \_\_\_\_\_ Maintenance & repairs

\$ \_\_\_\_\_ Parking

Lease terms: From: \_\_\_\_\_ To: \_\_\_\_\_ (Date)

\$ \_\_\_\_\_ New car - Cost

\$ \_\_\_\_\_ Old car - Sold for

## Section H

### SELF-EMPLOYED - BUSINESS USE OF HOME

*Business portion based on office feet<sup>2</sup> / total house feet<sup>2</sup>*

Sq. feet business area: \_\_\_\_\_ Sq. feet total \_\_\_\_\_

\$ \_\_\_\_\_ Gas (heating)

\$ \_\_\_\_\_ Hydro

\$ \_\_\_\_\_ Insurance

\$ \_\_\_\_\_ Maintenance & repairs

\$ \_\_\_\_\_ Mortgage interest

\$ \_\_\_\_\_ Property taxes

\$ \_\_\_\_\_ Rent

\$ \_\_\_\_\_ Strata fees

## Section I

### RENTAL INCOME - T776

\_\_\_\_\_ % Ownership of property with your spouse or \_\_\_\_\_

\$ \_\_\_\_\_ Gross income - from each property

\$ \_\_\_\_\_ Advertising

\$ \_\_\_\_\_ Insurance

\$ \_\_\_\_\_ Interest and bank charges

\$ \_\_\_\_\_ Office Expenses

\$ \_\_\_\_\_ Property management fees

\$ \_\_\_\_\_ Mortgage interest

\$ \_\_\_\_\_ Property taxes

\$ \_\_\_\_\_ Repairs & maintenance

\$ \_\_\_\_\_ Strata fees

\$ \_\_\_\_\_ Travel

\$ \_\_\_\_\_ Utilities

## Section E

### BUSINESS REVENUE - T2125

\$ \_\_\_\_\_ Sales

\$ \_\_\_\_\_ Sub-contract/T4A

## Section F

### BUSINESS EXPENSES - T2125

\$ \_\_\_\_\_ Advertising & promotion

\$ \_\_\_\_\_ Auto expense (see AUTO EXP.)

\$ \_\_\_\_\_ New equipment - provide invoices

\$ \_\_\_\_\_ Convention fees

\$ \_\_\_\_\_ Delivery, freight & express

\$ \_\_\_\_\_ Insurance

\$ \_\_\_\_\_ Legal, accounting

\$ \_\_\_\_\_ Licenses, dues & subscripts

\$ \_\_\_\_\_ Interest expense

\$ \_\_\_\_\_ Maintenance & repair

\$ \_\_\_\_\_ Meals & entertainment

\$ \_\_\_\_\_ Office expenses

\$ \_\_\_\_\_ Office Rent

\$ \_\_\_\_\_ Office heat & hydro

\$ \_\_\_\_\_ Office property taxes

\$ \_\_\_\_\_ Office cable charges

\$ \_\_\_\_\_ Salaries & wages

\$ \_\_\_\_\_ Supplies

\$ \_\_\_\_\_ Travel

\$ \_\_\_\_\_ Telephone, internet

## Section J

### GST RETURNS - GST 34-2

\_\_\_\_\_ Do you file your own or prefer us to prepare it?

\_\_\_\_\_ Do you file annually, quarterly or monthly?

\_\_\_\_\_ Does income/expense info include GST?

NOTES: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_