



## 2023 Tax Return Checklist



### Your 2023 Income:

- T4 (Employment Income)
- T4A (Taxable Disability Income)
- T4PS (Profit Sharing Income)
- T4 or T4A (Commission Income)
- T4A (Old Age Security Income)
- T4AP (Canada Pension Plan Income)
- T4A (Other Pension/Annuity Income)
- T4RSP (RRSP Income)
- T4RIF (RRIF Income)
- T4RSP (Withdrawals From RRSP)
- T4E (EI Benefits)
- T5007 (Worker's Compensation / WSIB)
- T5007 (Social Assistance Payments)
- T3s & T5s (Dividend Income)
- T5s (Interest Income)
- T5013 (Limited Partnership Income)
- T2200 (Employees' Expense Form)
- T5008 (Investment Income)
- T5018 (Self-Employed Income)
- Child Support Payments Rec'd \$ \_\_\_\_\_
- Spousal Support Payments Rec'd \$ \_\_\_\_\_
- Other Income:  
\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_

### Your 2023 Deductions/Credits:

- Charitable Donations \$ \_\_\_\_\_
- Political Donations \$ \_\_\_\_\_
- RRSP Contributions \$ \_\_\_\_\_
- Medical Expenses and Medical Mileage  
\$ \_\_\_\_\_ / \_\_\_\_\_ Kms
- Medical Insurance \$ \_\_\_\_\_
- Rent Paid \$ \_\_\_\_\_ Months
- Property Taxes Paid \$ \_\_\_\_\_
- Legal Fees for Investment Loan  
\$ \_\_\_\_\_
- Investment Loan Interest \$ \_\_\_\_\_
- Union Dues / Professional Dues  
\$ \_\_\_\_\_
- Child Care Expenses \$ \_\_\_\_\_
- T2202 (Post-Secondary Student)
- TL2 (Truck Driver's Logbooks or Summary)
- Child Support Payments Paid \$ \_\_\_\_\_
- Spousal Support Payments Paid \$ \_\_\_\_\_
- Ontario Staycation Credit Receipts
- Carrying Charges / Managing Fees on  
Investment Income \$ \_\_\_\_\_

### Other Information:

- Previous Year Notice of Assessment
- Did You Make Any Installment Payments In 2023?  
Yes \$ \_\_\_\_\_ Or No
- Do You Have a Disability Tax Credit on File With CRA? Yes Or No
- Did You Sell Your Principal Residence? Yes Or No
  - Year Purchased: \_\_\_\_\_ Sale Price \$ \_\_\_\_\_
- Do You Have a My Account? Yes Or No, Email If Yes: \_\_\_\_\_
- Do You Have a My Business Account? Yes Or No, Email If Yes: \_\_\_\_\_

*To Access Your Account  
Information, **CRA requires**  
A My Account and/or A My  
Business Account*