



## Updating your tax profile for 2023

<p>Is this the <b>first return we are preparing</b> for you?</p> <ul style="list-style-type: none"> <li>If yes, provide copies of the previous three years of tax returns and Canada Revenue Agency assessment/reassessment notices</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>Please provide your <b>address and telephone number</b> as they should appear on your tax return:</p> <p>Address (if changed from last year):</p> <p>Telephone:</p>		
<p>At any point during the year did you own <b>foreign property</b> – including foreign real estate, foreign securities whether held in a taxable Canadian account or outside the country, an interest in a foreign trust, cash held outside Canada, foreign debts, or any other foreign property of any kind – having a combined cost basis of C\$100,000 or more? (Note that foreign property does not include foreign securities held in an RRSP, RESP, RRIF, and TFSA account.)</p> <ul style="list-style-type: none"> <li>If yes, you are required to file Foreign Income Verification Statement T1135. There are significant penalties for failure to disclose foreign property and income. If applicable, provide T1135 detail information from your broker together with details of any other foreign property held in 2023 not on your broker’s report including income and gains/losses</li> <li>If you or a group of which you are a member have a controlling or other interest in a foreign affiliated corporation, trust, or partnership you are required to file Form T1134 Information Return Relating to Controlled and Non-Controlled Foreign Affiliates</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>Did you <b>sell a home</b> in the year?</p> <ul style="list-style-type: none"> <li>If yes, indicate address, date acquired, and proceeds of sale:</li> <li>Provide details of any other properties that you own, including vacation properties, that could be designated as a principal residence for the year or previous years:</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No

<p>Did you <b>emigrate from or immigrate to Canada</b> during the year?</p> <ul style="list-style-type: none"> <li>If yes, indicate date of exit or entry:</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>If you are a <b>Canadian citizen</b> do you authorize the Canada Revenue Agency to provide your name, address, date of birth, and citizenship to Elections Canada?</p>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>If you are an <b>Ontario resident</b> do you authorize CRA to provide your name and e-mail address to Ontario Health which may contact or send information to you regarding <b>organ and tissue donation</b>?</p>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>Did your <b>marital status</b> change during the year?</p> <ul style="list-style-type: none"> <li>If yes, indicate status at year-end as either married or common-law, separated or divorced, or widowed</li> <li>If you were married during the year and we do not prepare your spouse’s return, provide your spouse’s name, Social Insurance Number, and date of birth. Also provide line 23600 amount on your spouse’s tax return:</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>Were any <b>children born to you or adopted by you</b> in the year?</p> <ul style="list-style-type: none"> <li>If yes, provide child name(s), date(s) of birth, date(s) of adoption, and Social Insurance Number(s) if obtained:</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>During the year did you <b>transfer ownership of any assets</b> by gift or sale to your spouse or to children under the age of 18?</p> <ul style="list-style-type: none"> <li>If yes, we will contact you for details</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p><b>Direct deposit:</b> In case of a tax refund: (i) if you previously enrolled for direct deposit, have your banking details <i>changed</i>? or (ii) if you <i>did not previously enroll</i> for direct deposit do you wish to do so?</p> <ul style="list-style-type: none"> <li>If yes for either (i) or (ii), provide updated details of bank name, branch transit number, and account number</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No

## Employment

<p>Were you <b>employed</b> during the year?</p> <ul style="list-style-type: none"> <li>• Attach T4 slip(s)</li> <li>• Attach last pay statement for the year showing the components of income and deductions</li> <li>• Attach T4A slip(s), if applicable</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No – do not complete this section
<p>Did your employment contract require you to pay <b>expenses related to your work</b>, such as supplies or home office expenses, for which you were not reimbursed?</p> <ul style="list-style-type: none"> <li>• If yes, attach form T2200 signed by employer certifying the types of expenses you were required to pay</li> <li>• If yes, provide details of deductible employment expenses indicated in T2200 boxes 5, 6, 9, and 10</li> <li>• Note that beginning in 2023, CRA no longer provides a Covid-related deduction for home office expenses</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>Did you <b>move your home</b> during the year to be at least 40 km closer to a new place of work?</p> <ul style="list-style-type: none"> <li>• If yes, we will contact you for details</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>Did <b>any of the following apply</b> to your employment during the year? If yes, we will contact you for more information.</p> <ul style="list-style-type: none"> <li>○ You were employed as an “eligible educator” in an elementary or secondary school or regulated child care; or</li> <li>○ You owned 10% or more of any class of shares of the company or companies that employed you; or</li> <li>○ You participated in an employee share purchase plan; or</li> <li>○ You had personal use of an employer-provided vehicle; or</li> <li>○ Employer provided low-interest or interest-free loans; or</li> <li>○ You held, or exercised, employee stock options; or</li> <li>○ You received tips or other income not reported on T4 slips; or</li> <li>○ You participated in an apprentice program</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No

## Other income

<p>Did you receive any private or public <b>pension income</b> during the year such as Canada or Quebec Pension, OAS, employment pension, annuity, and income from any Registered Retirement Income Fund (RRIF) that you hold?</p> <ul style="list-style-type: none"> <li>If yes, attach any applicable slips including T4A(OAS), T4A(P), T4A, and T4RIF</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>Did you receive <b>Employment Insurance, social assistance, or workers' compensation</b> in the year?</p> <ul style="list-style-type: none"> <li>If yes, attach T4A, T4E and/or T5007 slips</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>During the year were you the <b>beneficiary of an estate or other private trust</b>?</p> <ul style="list-style-type: none"> <li>If yes, provide T3 slip(s) for any income paid or allocated to you by the trust or estate</li> <li>Indicate whether you disposed of part or all of your interest in the trust or estate, in which case we will contact you for further details</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>Did you <b>withdraw funds</b> from your RRSP or a spousal RRSP during the year?</p> <ul style="list-style-type: none"> <li>If yes, attach T4RSP slip(s) for taxable withdrawals</li> <li>If the withdrawal was for either the Home Buyers' Plan or Lifelong Learning Plan, indicate amount: \$_____</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>Did you <b>withdraw funds</b> from a First Home Savings Account (FHSA), or transfer funds between an FHSA and RRSP or RRIF, during the year?</p> <ul style="list-style-type: none"> <li>If yes, attach T4FHSA slip(s)</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>Did you <b>withdraw funds</b> from a Registered Education Savings Plan (RESP) or Registered Disability Savings Plan (RDSP) during the year, or receive any RDSP income?</p> <ul style="list-style-type: none"> <li>If yes, attach T4A slip(s)</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No

<p>Did you receive any of the <b>following types of income</b> during the year? If yes, please indicate and provide relevant tax slip(s) and details:</p> <ul style="list-style-type: none"> <li>○ Spousal support</li> <li>○ Child support</li> <li>○ Director fees</li> <li>○ Employment retiring allowance</li> <li>○ Retirement Compensation Allowance</li> <li>○ Scholarship, fellowship, bursary, and/or grants for research or artist projects</li> <li>○ Royalties</li> <li>○ Other forms of income such as tips, veterans' benefits, foreign-source payments, etc. which may be taxable – please describe and we will contact you:</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
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## Investments: dividends, interest, gains, and losses

<p>Did you <b>hold or sell any investments and other securities</b> during the year, including public company shares or partnership units, shares or units of private companies or partnerships, mutual funds, exchange-traded funds, bonds, term deposits, treasury bills, and mortgages?</p> <ul style="list-style-type: none"> <li>• If yes, attach any applicable slips including: T5, T3, T5013</li> <li>• Attach T5008, broker annual trading summary, and/or other details of proceeds and costs of securities sold</li> <li>• If you sold any private company shares, indicate whether the company is a Canadian Qualified Small Business Corporation (QSBC) for which you may be eligible to claim the lifetime capital gains exemption or Allowable Business Investment Loss (ABIL), and indicate if the proceeds from such sales were reinvested in shares of another QSBC during the year</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No – do not complete this section
<p>Did you hold any <b>“tax shelter” investments</b> during the year, including limited partnerships, flow-through shares or film properties?</p> <ul style="list-style-type: none"> <li>• If yes, provide relevant T5013, T5004, and T101 slips. We will contact you for other details that may be required.</li> <li>• Provide details of any interest and other carrying charges paid during the year on tax shelter investments</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>Did you hold, sell, or trade in any <b>other investment properties</b> during the year, including real estate, jewellery, foreign currencies, artwork and collectibles, precious metals, and commodities?</p> <ul style="list-style-type: none"> <li>• If yes, provide details or statements indicating sale date(s), proceeds, and cost of properties sold</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>Were any <b>proceeds of sale still owing</b> to you at December 31 from investments, other securities, or other investment properties sold?</p> <ul style="list-style-type: none"> <li>• If yes, provide details of proceeds owed to you at December 31 and payment terms</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>At any point during the year were any of the investments and other securities or other investment properties that you owned <b>held outside Canada</b> (for example in a foreign bank or broker account, or physically located outside the country)?</p>	<input type="checkbox"/> Yes	<input type="checkbox"/> No

<p>Did you pay <b>investment counsel fees, accounting fees, and/or legal fees</b> with respect to your non-registered (i.e. taxable) investments during the year?</p> <ul style="list-style-type: none"> <li>• If yes, provide statements or details of amounts paid</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>Did you pay any <b>interest</b> during the year on loans for the purchase of taxable investments?</p> <ul style="list-style-type: none"> <li>• If yes, provide statement showing interest paid for the year, and indicate whether there was any change in the principal balance(s) of the loan(s) during the year</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>Did you <b>donate</b> any investment securities or other investment properties to a registered Canadian charity during the year?</p> <ul style="list-style-type: none"> <li>• If yes, attach charity donation slip showing the details of the in-kind donation, and provide cost basis of the donated property or properties.</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No



## Rental income

Did you receive any <b>rental income</b> or own any residential or commercial rental property during the year?	<input type="checkbox"/> Yes	<input type="checkbox"/> No – do not complete this section
Were any of the rental properties you owned during the year located <b>outside Canada</b> ?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Did you receive rental income for <b>any part of your principal residence</b> during the year? Principal residence includes the home where you normally reside and can also include any vacation property that you own.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>Provide the following details for each rental property owned:</p> <ul style="list-style-type: none"> <li>○ Address, ownership percentage (if you have partners also indicate their names, addresses, and Social Insurance Numbers), number of units, and rental income</li> <li>○ Rental expenses including any of the following that are applicable: <ul style="list-style-type: none"> <li>○ Advertising, insurance, mortgage interest (if any), office expenses, professional fees (legal, accounting, and other), management fees (if any), maintenance and repairs (excluding the cost of any improvements), salaries (if any), property taxes, travel, utilities, vehicle expenses incurred in relation to the rental property, and other expenses (specify)</li> </ul> </li> <li>○ Additions to the rental property, including the cost of improvements, new structures, furnishings, and equipment</li> </ul>		

## Business income

<p>Did you operate one or more <b>unincorporated businesses</b> during the year?</p> <ul style="list-style-type: none"> <li>If yes, your tax return is due for filing on or before June 15, however interest will be applied on any unpaid tax balance after April 30</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No – do not complete this section
<p>Is the unincorporated business a <b>new business</b> that began during the year?</p> <ul style="list-style-type: none"> <li>If yes we will contact you for more details</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>If we do not prepare the bookkeeping or financial statements for your businesses, provide the following details for each unincorporated business operated during the year:</p> <ul style="list-style-type: none"> <li>Business name, ownership percentage (if you have partners also indicate their names, addresses, and Social Insurance Numbers), and HST registration number (if the business is registered to charge HST)</li> <li>Business revenue accounted for on the accrual basis</li> <li>Business expenses including any of following categories that may be applicable:             <ul style="list-style-type: none"> <li>Advertising, meals and entertainment, bad debts, insurance, interest, taxes, licences, memberships, office expenses, supplies, professional fees (e.g. legal and accounting), management and administration fees, rent, repairs and maintenance, salaries and benefits costs, property taxes, travel, utilities, delivery, conference and conventions, bank charges, training, vehicle expenses incurred in relation to the business, home office expenses related to the business, and other expenses (specify)</li> </ul> </li> <li>Additions to business property, including the cost of furniture, computer equipment, and other equipment</li> </ul>		

## Deductions and tax credits

<p>Did you contribute to <b>your RRSP or a spousal RRSP</b> for the year, up to and including the first 60 days of 2024?</p> <ul style="list-style-type: none"> <li>• If yes, provide contribution slip(s)</li> <li>• If you have a balance owing under the RRSP Home Buyers' Plan or RRSP Lifelong Learning Plan and wish to repay more than the required minimum for the year, please indicate the additional repayment amount: \$_____</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>Did you contribute to a <b>First Home Savings Account (FHSA)</b> by December 31, 2023?</p> <ul style="list-style-type: none"> <li>• If yes, provide T4FHSA slip</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>Did you make any income tax <b>instalment payments</b> during the year?</p> <ul style="list-style-type: none"> <li>• If yes, provide Canada Revenue Agency statement showing instalments paid or provide payment dates and amounts</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>Did you or spouse pay any <b>childcare expenses</b> during the year for children 16 years and younger, or otherwise for children who have a registered medical disability? Note that the child care expense deduction can be claimed by single individuals, or otherwise by the spouse with the lower income</p> <ul style="list-style-type: none"> <li>• If yes, attach receipts or invoices boarding schools, overnight camps, and/or caregivers, or T4 slip issued to a caregiver employed by you. Receipts and invoices must show the name(s) of the child or children who received the care</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>Did you repay any <b>Covid-19 benefits</b> during the year? If yes, provide details.</p>	<input type="checkbox"/> Yes	<input type="checkbox"/> No

<p>Did you pay any <b>medical expenses</b> for you, spouse, or your dependant children/relatives in any 24-month period ending in the year that were not covered by insurance or otherwise reimbursed to you? Note that medical expenses include the cost of prescription medications and prescribed medical devices, nursing and attendant care, and well as fees paid to provincially-regulated medical practitioners (in Ontario these include medical doctors, dentists, chiropractors, registered massage therapists, and naturopaths). Medical expenses also include premiums paid for private health care insurance plans.</p> <ul style="list-style-type: none"> <li>• If yes, provide receipts indicating patient name, treatment date, nature of treatment, and practitioner’s qualification</li> <li>• Provide details of any insurance or other reimbursements received</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>Did you or a dependant have a <b>medical disability</b> during the year that qualifies for the disability tax credit?</p> <ul style="list-style-type: none"> <li>• If yes, provide Disability Tax Credit Certificate T2201 (if not previously filed with CRA) completed and signed by a qualified medical practitioner describing the nature and duration of the disability</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>Did you make any <b>charitable donations, or gifts</b> to Canadian governments or other public institutions, during the year?</p> <ul style="list-style-type: none"> <li>• If yes, provide receipts from the charities, governments, or public institution. Note that receipts from Canadian charities must indicate charity’s registration number</li> <li>• If donations were made to U.S. charities, provide receipts and note that credit for such donations will be limited to 75% of U.S.-source income, if any</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>Did you pay for a <b>digital news subscription</b> to a Qualified Canadian journalism organization? If yes, you can claim a credit of up to \$500</p>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>Did you make any federal or provincial <b>political donations</b> during the year?</p> <ul style="list-style-type: none"> <li>• If yes, provide receipts</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No

<p>Did you pay <b>student loan interest or tuition fees</b> during the year, or were tuition fees paid for dependant(s) whose taxable income is sufficiently low that they cannot claim the full tuition fee credit?</p> <ul style="list-style-type: none"> <li>• If yes, provide T2202, TL11A, and/or TL11C slips</li> <li>• If you are claiming a part of all of a dependant’s tuition and we do not prepare the dependant’s tax return, provide the following amounts from the dependant’s tax return: line 23600, 26000, and the total of lines 30300 to 31400</li> <li>• If you paid student loan interest, attach statement showing amount of interest paid during the year</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>Did you <b>purchase a home</b> during the year, and neither you nor your spouse owned and lived in another home in the year or any of the four preceding calendar years such that you qualify as a first-time home buyer for the home buyers’ credit?</p> <ul style="list-style-type: none"> <li>• If yes, indicate date of purchase of home</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>Did you pay <b>legal fees in the year to collect salary or wages</b> owed?</p> <ul style="list-style-type: none"> <li>• If yes, provide paid invoices</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>Did you pay <b>union or professional dues</b> during the year?</p> <ul style="list-style-type: none"> <li>• If yes, provide statements or receipts showing nature and amounts of dues paid</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>Did you pay <b>spousal support</b> during the year under a separation agreement or court order?</p> <ul style="list-style-type: none"> <li>• If yes, provide details of amount paid</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>Did you incur any <b>adoption expenses</b> during the year?</p> <ul style="list-style-type: none"> <li>• If yes, provide receipts or invoices and proof of payment</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>Did you <b>volunteer</b> as a firefighter or for search and rescue during the year?</p>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>Did you <b>pay rent or property taxes</b> during the year and was your income <u>below</u> the maximum to claim a credit? (In Ontario, the 2024 benefit year maximum income ranges between approximately \$81,000 and \$102,000 depending on age and family status).</p> <ul style="list-style-type: none"> <li>• If income is <u>below</u> the maximum, provide rent receipt(s) from landlord or municipal property tax statements</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No

<p>During the year, did you pay <b>home accessibility costs</b> for a qualifying individual who is either 65 years or older or eligible for the disability tax credit? If yes, provide details and records for up to \$20,000 of home renovation, alteration, or other costs.</p>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>During the year, did you pay <b>renovation costs to create a secondary unit</b> within an eligible dwelling so to allow a qualifying relation who is aged 65 years or older, or 18 years or older and qualifies for the disability tax credit, to live with you? If yes, provide details and records for up to \$50,000 of cost for the Multigenerational Home Renovation Tax Credit (MHRTC).</p>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>If you are a senior living in Ontario, did you pay public transit or specialized disability transit fares during the year?</p> <ul style="list-style-type: none"> <li>• If yes, provide receipts for payment to a maximum of \$3,000</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>During the year did you <b>repay any benefits</b> from Employment Insurance, Old Age Security, research grants or scholarships, or from Canada Pension received in a previous year?</p> <ul style="list-style-type: none"> <li>• If yes, indicate types and amounts of repayments</li> </ul>	<input type="checkbox"/> Yes	<input type="checkbox"/> No