

2023 Personal Income Tax Information

Name: _____

Address: _____

Phone #: _____ Cell #: _____ e mail: _____

Additional information included for: Spouse: _____

Please list dependent children:

Name	Date of Birth	Sex	Name	Date of Birth	Sex
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

How would you like your 'client copy' of your tax return? Print format OR Memory stick

Are you a Canadian citizen? Yes No **If NO, please state citizenship:** _____

Do you or your spouse own foreign property costing more than \$100,000 Canadian? Yes No

Information Slips enclosed:

# of Slips	Slip ID	Description
	T4	Employment Income
	T5	Interest, Dividends
	T3	Estate and trust income (may only receive in early April)
	T4A	Other income
	T4E	Employment insurance benefits
	T4A (OAS)	Old age security
	T4A (P)	Pensions
	T5007	Workers compensation, social assistance (including Alberta senior's benefits)
	T5008	Statement of securities
	T5013	Partnership income
	Other	i.e. Foreign interest income, foreign pensions (please list amounts received if no slips received)

Receipts enclosed:

# of Slips	Description
	Charitable donations
	Medical Receipts (private health care premiums may be indicated on last pay stub for 2023) (also, provide summaries from providers i.e. prescription, dentist, chiropractors)
	Union and professional dues
	Interest expense
	Political contributions
	Interest statements on student loans
	Education deduction (T2202) tuition fees
	RRSP contributions (if you contribute monthly, include receipts for 1 st 60 days of 2024)
	Child care expenses
	2022 Notice of Assessment (if we have authorization with CRA this is not required)
	Others: Direct Deposit Information (if you have not previously set this up)