

RKG TAX & ACCOUNTING INC.

CHARTERED PROFESSIONAL ACCOUNTANT

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Personal Tax Information / Checklist

Taxation Year :

To guarantee that your return will be prepared by April 30, we must have all your data by April 16th

Identification:

DD-MMM-YYYY

Your Name:		Your SIN		Your Birth Date:	
Spouse Name:		Sps. SIN		Spouse Birth Date:	
Address		Your Phone #			
		Spouse Phone #			
Your E-Mail		Spouse Email			

Marital Status:

☐ Married ☐ Widowed ☐ Divorced ☐ Common-Law* ☐ Separated ☐ Single

Did your marital status change during the year? ☐ Yes ☐ No If so, provide the date

If we are **NOT** preparing a tax return for your spouse, please provide the following:

Net Income figure from line 23600 on page 2 of his/her 2023 tax return

* Includes same-sex relationships

Dependents:

List any **dependents** who were 18 years of age or under as of December 31, 2023

Name	Relationship	2023 Net Income	Date of Birth	SIN

Do you or your spouse or any of your dependents qualify for disability credit?

Do you provide shelter and/or financial support to any other relatives (parents)? ☐ Yes ☐ No

Other Important Information & Delivery of Return:

Do you want to file your return electronically?	Yes	No
Did you own/hold foreign property with a cost of more than \$100,000? (Attach details if Yes)	Yes	No
Do you authorize CRA to provide information about you to Elections Canada?	Yes	No
Do you want your tax refund deposited Directly to your bank account? (Attach void cheque if yes)	Yes	No
Are you Canadian Citizen?	Yes	No
Has Your last name changed?	Yes	No
Did you sell a home in taxation year and want to claim the principal residence exemption?	Yes	No
are you filing for the first time in taxation year?	Yes	No

Employment Expenses

Include a T2200 - Declaration of Employment Conditions from your employer.

Accounting/Legal Fees		Lodging		Telephone		Supplies (Postage, etc...)	
Meals/Entertainment		Parking		Other		Specify	

Automobile Expenses

For business and employment

Year and Make of Automobile		Year of Purchase		Purchase Amount	
Total Kilometers Driven in Year		Total Kilometers Driven in Year for Business			

If car was purchased or leased in 2023, provide a copy of the purchase or lease agreement

Fuel		Insurance		Payments		Licensing and Registration	
Tolls		Car Washes		Loan Interest		Repairs and Maintenance	
Other		Specify		Other		Specify	

Home Office -

For Business and Employment

Percentage of Home Used for Business		Telephone		Hydro		Rent	
Mortgage Interest (Self-Employed Only)		Property Taxes		Heat		Water	
Maintenance and Repairs		Internet		Other		Specify	

Home Office - Covid Benefit

- Are you working from home due to COVID Restrictions?
☐ Yes
- Claim Simple Method (\$2 per day, \$400 for 2020 and \$500 for 2021 and 2022 MAX)?
☐ Yes
- Use Detailed Method (must provided detailed expenses)
☐ Yes

Other Information

Did you make tax installment payments during the year?	Yes	No
Did you participate in Home Buyers Plan?	Yes	No
Did you participate in the Lifelong Learning Plan?	Yes	No
Is your child transferring post-secondary tuition amount to you? if yes, please provide copy of signed T2202A slip	Yes	No
Are you including your last year's Notice of Assessment?	Yes	No
New Clients - are you including your last year's tax return schedules	Yes	No

Please note, no items will be included onto your tax return without the proper documentation. In the event of an audit, the onus of proof is on the taxpayer.

Signature :

Date :