



2023 PERSONAL INCOME TAX QUESTIONNAIRE

This questionnaire is designed to assist you in compiling the information necessary to prepare your 2023 personal tax return. Please return this form with your documentation if your address, contact information or family situation has changed.

***If you are a returning client, please use the portal that we set up last tax season to download any slips or information relevant to preparing your 2023 Personal Tax Return. If you cannot locate the link to the portal or are having troubles logging in, please let Kim know ASAP at kimh@hpcpa.ca so a new link can be sent. If you are a new client, we will set you up with the portal shortly after your intake meeting. If this has not been done, please email kimh@hpcpa.ca so you will be set up. The link to the portal is <https://haca.cchifirm.ca/clientportal>

Client Name _____

Telephone (____) _____ Fax (____) _____ E-mail _____

Please indicate address only if changed since 2021 income tax return:

Indicate if you reside outside of a census metropolitan area on Dec 31, 2023 as defined by Statistics Canada _____

Marital status (if changed in 2023, indicate change and date) _____

New family members:

Name: _____

Date of birth: _____

Date of adoption: _____

Are you missing information? Please list items expected to come:

Unless otherwise indicated, we will assume you wish to be registered with Elections Canada. To opt out, please check here _____

Please check items attached:

INCOME

- Employment – T4
- Old Age Security – T4A(OAS)
- Canada Pension Plan benefits – T4A(P)
- Retirement Income – T4A for pensions, T4RSP, T4RIF
(attach details of spouse's income to determine if pension splitting is beneficial)
- Employment Insurance – T4E
- Interest, Dividends and other Investment Income – T5/T600
- Mutual Funds and other Trust Income – T3
- Business or Professional – Financial Statements or T5013 (include all amounts from sharing economy ex Uber, Skip the Dishes)
- Crowd Funding – did you organize or manage a crowd funding campaign (ex. Go Fund Me)
- Rental Property – include amounts received from sharing economy such as Air BnB, VRBO (attach details of income, expenses, purchases and sales. For purposes and sales please provide the statement of adjustments and the statement of receipts and disbursements) NOTE: effective Jan 1,2023 any short term residential property sales (property held less than a year)is deemed to be business income for dispositions.
- Capital Gains/Losses
- Internet business activities – any activity where income is earned from website, apps or webpages
- Did you dispose of any capital properties this year?
(attach copies of sales detail and original purchase documentation.)
- Details of the disposition of your PRINCIPAL residence, including address, year acquired and proceeds
- Alimony (provide copy of post-April 30, 1997, agreement or election, if changed or not, previously provided)
- Bitcoin or crypto currency transactions
- Other Income (e.g., stock options, annuities, scholarships, bursaries, research grants, RRSPs – attach T4RSP, Workers' Compensation benefits)
- Did you receive interest, dividends or benefits from a business in which a relative is a key party (in terms of ownership or involvement)

DEDUCTIONS & CREDITS

- Registered Retirement Savings Plan contributions (attach receipts)
(attach T10 – Personal Adjustment Reversal, if you received one.)

- First Home Savings Account (FHSA) contributions (attach receipts)
- Annual union, professional dues (attach receipts)
- Child care expense (attach receipts):
 - (a) For individual providers, include S.I.N. and address

 - (b) For summer camps, indicate number of weeks in-residence

- Attendant care expenses (attach receipts) – if you provided in-home care for a parent or grandparent 65 years of age or older or inform dependent relative, a federal credit may be available
- Allowable business investment losses (refer to Capital Gains/Losses above)
- Moving expenses (attach receipts). Indicate distance moved to new employment

- Alimony or separation allowances paid (include name(s) and address(es) of recipients; attach copy of agreement or court order for spousal support which was signed on or after May 1, 1997 or election, if changed or not, previously provided) _____
- Commission and employment expenses (include details and a signed T2200 or TL2)
- Work from home expenses – note the simplified method cannot be claimed in 2023. A T2200 must be issued and detailed method must be used.
- Labour mobility deduction for eligible trades employees
- Carrying charges (interest on money borrowed to earn dividend and interest, investment counsel fees, interest for limited partnerships)
- Please advise if you repaid COVID-19 support payments
- Other deductions and expenses (attach receipts)
- Federal and provincial political contributions (attach receipts)
- Charitable donations (attach receipts) (provide details of gifts in kind, e.g., securities)
- Medical expenses (attach receipts) and details of private health insurance premiums, including amounts paid while travelling (for dependents over age 18, up to \$10,000 can be transferred) – most pharmacies give a summary of all prescriptions that have been filled. This summary is preferred to separate medical receipts as this ensures all receipts have been counted for.
- Doctor prescribed medicinal marijuana expenses
- Costs related to the use of reproductive technology going back 10 years, including surrogacy.
- Disability deduction for you or dependent (if first-time claim, attach T2201 signed by physician) Reminder: individuals with Type 1 diabetes may qualify
- Adoption expenses
- Tuition fees (attach T2202/T2202A including amounts that can be transferred from dependants)

- Labour-sponsored funds – T5006
- Interest paid on student loans (attach reporting slip)
- Details of home purchase if you are a first time home buyer
- Apprentice tools and information if you are employed as an apprentice
- Teachers or early childhood educators, provide receipts (up to \$1,000) for eligible school supplies
- Receipts for renovations or alterations to your home to enhance mobility or reduce harm to an individual who is either eligible for the Disability Tax Credit or 65 years or older
- Receipts for multi-generational home renovations
- Covid 19 benefits repayments
- If you are a caregiver for any infirm family member or provide in home care for an infirm dependent relative, please provide details below:

For wholly dependent persons, please attach list and indicate for each dependant:

Name: _____

Address if different: _____

Relationship: _____

Birth date: _____

S.I.N.: _____

Net income: _____

Infirmity, if any: _____

OTHER

- 2023 Installments (attach February 2024 notice). Total remitted: \$_____
- Attach copy of 2022 Notice of Assessment notices and other correspondence from the Canada Revenue Agency
- Amount of any contributions to or distributions from, or loans to or from foreign trusts in 2023
- Details of foreign property, other than personal-use property, if aggregate cost is in excess of \$100,000, as well as any investment in “foreign affiliates”
- Details of disposal of personal use/recreation properties.

COMMENTS
