

# 2023 Simplified Checklist Personal Income Tax Return

## HELP US BETTER ASSIST YOU

We have prepared this simplified checklist for our clients who have a personal tax situation that doesn't change much from year to year and who already know what information they need to provide us with. If you are uncertain or if you simply wish to verify if additional information is required, you can consult our complete checklist as well as the additional schedules (also on our website).

Please take a few minutes to answer the following questions and provide us with any comments concerning your personal situation in the "additional information" section.

Other than the 2023 tax information slips and details for your income and documents supporting the deductions you are claiming, including the RRSP slips for the contributions made in the first **60 days of 2024**, you may need to provide us with additional documents if you are eligible for one of the new credits or deductions available. Please consult the "**What's New for 2023**" schedule to find out more about these changes.

We would greatly appreciate it if you would send us a duly completed copy of this checklist, together with **electronic (PDF format) or paper copies** of all information slips and other documents required for the preparation of your income tax returns. Please **DO NOT** send us picture files from smart phones as they are often unreadable, which can result in errors and delay the completion of your returns. Please note that all original documents sent to us will be returned to you.

We will forward the copies of your tax returns to you by PDF, together with any documents to be signed and returned to us through your access to our new secure portal.

## YOUR PERSONAL SITUATION

### YOU (so we can confirm your coordinates)

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Home number: \_\_\_\_\_

Work number: \_\_\_\_\_

Cell number: \_\_\_\_\_

Fax number: \_\_\_\_\_

Email: \_\_\_\_\_

### MARITAL STATUS

Single  Married\*  Divorced

Common-law  Separated  Widowed

\* If you are married, what is your matrimonial regime?

Partnership of acquests  Community of property

Separation as to property

Has your marital status changed during the year?

Yes  No

**Date of change (mm/dd):** \_\_\_\_\_

Please provide the following information for each member of your family for whom we will be preparing tax returns:

Spouse's name: \_\_\_\_\_ Email: \_\_\_\_\_ Cell number: \_\_\_\_\_

Child's name: \_\_\_\_\_ Email: \_\_\_\_\_ Cell number: \_\_\_\_\_

Child's name: \_\_\_\_\_ Email: \_\_\_\_\_ Cell number: \_\_\_\_\_

Child's name: \_\_\_\_\_ Email: \_\_\_\_\_ Cell number: \_\_\_\_\_

### YOUR SPOUSE

#### If tax returns are not prepared by us:

Name: \_\_\_\_\_

Date of birth: \_\_\_\_\_

S.I.N.: \_\_\_\_\_

#### Net income of your spouse

As per line 23600 (federal): \_\_\_\_\_

As per line 275 (Québec): \_\_\_\_\_

# 2023 Simplified Checklist Personal Income Tax Return (cont'd)

2023

## YOUR PERSONAL SITUATION (cont'd)

Did you live alone or only with minor or dependent children attending post-secondary school throughout the entire year?  Yes  No

### FOREIGN PROPERTY (see "Foreign Property" schedule)

At any time during the year, did you own foreign property with a **total cost** of more than \$100,000 CAD? *(If yes, please provide details.)*  Yes  No

### DISPOSITION OR DEEMED DISPOSITION

The disposition of a principal residence, land or other property must be reported (sale or transfer).

Did you dispose of a principal residence, land or other property in 2023? *(If yes, please provide details.)*  Yes  No

*A deemed disposition must also be reported on your income tax returns. A deemed disposition can occur when you have a change in the use of a property. For example, if a rental property (or part of a rental property) starts being used as a principal residence or, conversely, if you start renting your principal residence.*

Did you change the use of a property in 2023? *(If yes, please provide details.)*  Yes  No

### VIRTUAL CURRENCY

In 2023, did you receive or dispose of (sell, transfer, exchange, give, etc.) virtual currency (like Bitcoin)? *(If yes, please provide details.)*  Yes  No

### FHSA

Did you open one or more FHSAs in 2023 and did not make any contributions, transfers or withdrawals?  Yes  No

## QUÉBEC RESIDENTS ONLY

### CONTRIBUTION TO THE QUÉBEC PRESCRIPTION DRUG INSURANCE PLAN

Were you (and your spouse, if any) covered by a group insurance plan for prescription drugs for the entire year?  Yes  No

*\* If you were covered by the RAMQ's public insurance plan, please answer "No".*

If you were covered for only **part of the year**, please provide the period of coverage: From: \_\_\_\_\_  
To: \_\_\_\_\_

### REFUND TRANSFERRED TO SPOUSE

Québec only:

If you are allowed a refund, and your spouse has an amount due, would you like to apply all or part of your refund to pay the amount due by your spouse?  Yes  No

If your spouse has a refund, and you have an amount due, can we transfer all or part of the refund to pay for your amount due?  Yes  No

## ADDITIONAL INFORMATION

