

1. PERSONAL INFORMATION			
Full name (First name, Last name)	SIN	DOB (MM/DD/YYYY)	Phone
Resident Address			Email
Resident status <input type="checkbox"/> Canadian Citizen <input type="checkbox"/> Permanent Resident <input type="checkbox"/> Work permit <input type="checkbox"/> Study permit <input type="checkbox"/> Other (please specific)	Marital status <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Common Law <input type="checkbox"/> Separated <input type="checkbox"/> Widowed <input type="checkbox"/> Divorced	You lived in Canada in 2022? <input type="checkbox"/> Yes <input type="checkbox"/> No Place of residence as on December 31, 2022	
If your marital status changed during the year, provide the date it changed (MM/DD/YYYY)			
Employment Status <input type="checkbox"/> Employed <input type="checkbox"/> Self-employed <input type="checkbox"/> Other (please specific)	If Self-employed, please provide information Business number Province		
2. SPOUSE INFORMATION			
Full name (First name, Last name)	SIN	DOB (MM/DD/YYYY)	Resident status <input type="checkbox"/> Canadian Citizen <input type="checkbox"/> Permanent Resident <input type="checkbox"/> Work permit <input type="checkbox"/> Study permit <input type="checkbox"/> Other (please specific):
<i>If we are not preparing your spouse's tax return, please let us know Taxable income figure from line 26000 of their tax return.</i>			
3. CHILDREN'S INFORMATION			
How many children do you have?			
Child 1 – Full name	SIN	DOB (MM/DD/YYYY)	<input type="checkbox"/> Disability
Attending Post-Secondary Institution? <input type="checkbox"/> Yes <input type="checkbox"/> No - If yes, please attach T2202A			
Child 2 – Full name	SIN	DOB (MM/DD/YYYY)	<input type="checkbox"/> Disability
Attending Post-Secondary Institution? <input type="checkbox"/> Yes <input type="checkbox"/> No - If yes, please attach T2202A			
Child 3 – Full name	SIN	DOB (MM/DD/YYYY)	<input type="checkbox"/> Disability
Attending Post-Secondary Institution? <input type="checkbox"/> Yes <input type="checkbox"/> No - If yes, please attach T2202A			

4. SALE OF PRINCIPAL RESIDENCE	
Did you sell your principal residence in 2022? <input type="checkbox"/> Yes <input type="checkbox"/> No	
If Yes: Year of Acquisition Buying price Selling price Please provide documents (ex. Seller's Statement of Adjustments, Gain/ Loss summary from Broker)	
5. FOREIGN REPORTING	
There are filing requirements for a taxpayer who had "Specified Foreign Property" with a cost of more than \$100,000 CDN during the year. If No , please skip #5, go to #6 Income Source Check List	
Did you have property outside Canada with a cost of more than CAD \$100,000 during this year <input type="checkbox"/> Yes <input type="checkbox"/> No	
Did you have an investment account with a Canadian broker that holds foreign investments, such as shares of non-Canadian entities (other than a RRSP/RRIF/TFSA/RESP investment account)? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Did you have an investment account, or a bank account located outside of Canada? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Did you own any real estate (other than real estate used exclusively for personal use) or other assets (defined below) outside of Canada? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Did you own any foreign securities personally and not through a broker? <input type="checkbox"/> Yes <input type="checkbox"/> No	
If yes to any of the above, would the total cost of all of the foreign assets have been over \$100,000 CDN at any point during the year? And we will contact you to fill out another form requested by CRA.	
6. INCOME SOURCE CHECKLIST	
Employment Income (T4) <input type="checkbox"/>	Interest, dividends, mutual funds (T3, T5 and T5008) <input type="checkbox"/>
Employment Insurance (T4E) <input type="checkbox"/>	Partnership Income (T5013) <input type="checkbox"/>
Pension and Annuity Income (T4A) <input type="checkbox"/>	Social assistance payments and worker compensation benefits (T5007) <input type="checkbox"/>
Old Age Security and CPP benefits (T4AP, T4A-OAS) <input type="checkbox"/>	Universal Childcare Benefits (RC62) <input type="checkbox"/>
RRSP and RIF income (T4RSP and T4RIF) <input type="checkbox"/>	Tuition/ education receipts (T2202 or TL11) <input type="checkbox"/>
Rental income (summary of revenue & expenses) <input type="checkbox"/>	Other income <input type="checkbox"/>
7. TAX DEDUCTIONS/ CREDITS CHECKLIST	
RRSP Contribution receipt <input type="checkbox"/>	Employment Expenses <input type="checkbox"/>
Union/Professional Dues (exclude on T4) <input type="checkbox"/>	Office-in-home Expenses <input type="checkbox"/>
Exam fees professional designations <input type="checkbox"/>	Teacher who pays for their own supplies? <input type="checkbox"/>
Medical Expenses (net of any reimbursements) <input type="checkbox"/>	Charitable or Political Donations <input type="checkbox"/>

INCOME TAX PREPARATION CHECKLIST- 2022

Child Care Expenses <input type="checkbox"/>	First-Home Buyer? <input type="checkbox"/>
Adoption Expenses <input type="checkbox"/>	Legal Expenses to collect alimony, pension, or retiring allowance <input type="checkbox"/>
Moving Expenses (if at least 40km's closer to work) <input type="checkbox"/>	Home accessibility Expenses (if a senior or eligible for the disability tax credit) <input type="checkbox"/>
Tuition Fees (T2202A – Signed by Student) <input type="checkbox"/>	Interest/ Fees paid on Investments (Non-registered) <input type="checkbox"/>
National Student Loan Interest <input type="checkbox"/>	CERB / CRB benefits repaid <input type="checkbox"/>
Any other allowance deduction <input type="checkbox"/>	

Note: CRA Access is required to file your Tax Return 2022. Please say YES to authorize East Coast Accounting to access CRA to file your Tax Return 2022.

Yes No