

2022 Personal Tax Checklist

Thank you for choosing Rise CPA to manage your personal tax needs. For accuracy in preparing your returns, please complete the four sections in BLUE

Name: Address & Postal Code: Contact Number: E-Mail: DEPENDENTS INFORMATION Name Relationship DOB Physically or mentally income Expenses REAL PROPERTY You are required to report basic information on your tax return when you sell your principal residence in order to claim your principal residence exemption. Did you sell real estate property in 2021, including a principal residence? Yes No If yes, please provide the following: 1 Address of the property sold 2 Date of acquisition 3 Original cost of the property 4 Proceeds of disposition 5 Purchaser's statement of adjustments from your original purchase 6 Seller's statement of adjustments from your original purchase 6 Seller's statement of adjustments FOREIGN PROPERTY Are you a Canadian citizen? If you are a U.S. citizen, have you been filling U.S. Returns? Yes No, please specify: If you are a U.S. citizen, have you been filling U.S. Returns? At any time in 2021, did you own or acquire the following specified foreign property with a total cost in excess of \$100,000 CAD? Foreign bank accounts Interests in non-resident trusts Foreign fangible property (such as rental property) Debt owed by a non-resident Other property outside Canada Was the total cost of all specified foreign property held:	PERSONAL						
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If any of the above specified foreign property is held in an account with a Canadian registered securities dealer or a Canadian trust company, such as your bank, you can obtain the necessary information by contacting your investment advisor.							

2022 PERSONAL TAX ORGANIZER

This checklist will help you get your tax records organized

INCOME				
Personal	Investment			
☐ T4 - Employment Income	T3 - Trust and Mutual Fund Income			
☐ T4E - Employment Insurance Benefits	☐ T5 - Interest and Dividends			
☐ T4PS - Employee Profit-Sharing Plan Allocations and Income	☐ T600 - Canada Savings Bonds			
☐ T4A - Pension, Retirement, Annuities and Other Income	$_{\square}$ T5008 - Statement of Security Transactions			
☐ T4A(OAS) - Old Age Security Benefits	☐ T5013 - Limited Partnership Income (Loss)			
☐ T4A(P) - Canada Pension Plan Benefits	☐ Capital Gains/Losses			
☐ T5007 - WCB Benefits/Social Services Benefits	☐ Rental Income (Summary Schedule)			
☐ T4RIF - RRIF Income	☐ Alimony Received			
☐ T4RSP - RRSP Withdrawal	$_{\square}$ Taxable Child Support Received			
☐ Self-Employed Earnings Information	☐ Scholarships/Bursaries			
☐ Self-Employed Commissions Earnings Information	☐ Other-Specify			
☐ Professional Earnings Information				
☐ Farming/Fishing Earnings Information				

DEDUCTIONS AND CREDITS					
Personal					
Adoption Expenses		Interest and Carrying Charges on Investments			
☐ Alimony Paid		Interest Paid on Student Loans			
Allowable Business Investment Loss		Investment Counsel and Accounting Fees			
Apprentice Job Creation Credit		Medical/Dental/Vision Receipts			
☐ Attendant Care Expenses		Moving Expenses			
☐ Caregiver Amount		Political Contribution Receipts			
☐ Charitable Donations (Official Tax Receipts)		Premiums Paid to Private Medical Insurance Plans			
☐ Child Care Expenses		Prescription Receipts Summary from Your Pharmacy			
☐ Deductible Child Support Paid		RRSP Receipts			
☐ Deductible Legal Fees		Social Benefit Repayments			
☐ Disability Support Deductions		Spouse Amount - Equivalent to Spouse's Net Income			
☐ Disability Tax Credit Certificate		Spouse Amount - Spouse's Net Income			
Employment Expenses - Expense Summary		Tradespersons Tools Expenses			
Eligible Teaching Supplies Purchased (for teachers and early educatiors only)		Tuition - T2202/T2202A - Tuition Fees			
☐ T2200 Declaration of Conditions of Employment		Tuition - Dependent's Net Income (For Transfer of Credits)			
☐ Homebuyers Credit		Union and Professional Dues			
☐ Home Office Expenses as an Employee (for eligibility please see - Home Office Expenses)					

CRA CORRESPONDENCE					
☐ 2020 Notice of Assessment (CRA)	☐ Summary of 2021 Tax Installment Payments				
OTHER INFORMATION					
Please use this space for any additional information or notes:					

TO UPLOAD DOCUMENTS SECURELY PLEASE CLICK HERE