



Personal Tax Checklist 2022

Tax Returns to Be Prepared

(Include address if different from previous year)

Name _____	Address _____
Name _____	Address _____
Name _____	Address _____
Name _____	Address _____

Marital Status of Parent(s) (Please Circle One, Only if Changed):

Married Divorced Single Separated Widowed Common Law

Date of 2022 change in marital status _____

Note if any children/dependents have a marital status of other than single.

Children Born in 2022:

Name _____	Birth Date _____
Name _____	Birth Date _____

Tuition Tax Credits:

Do you want to transfer tuition tax credits from children to parents? Yes No

If yes, provide a signed T2022A from each child transferring credits

Principal Residence:

Did you sell any residences during the year (house, cabin, condo, etc.)? Yes No

If yes, provide information on cost of residence, including major renovations and year of purchase.

Please also provide proceeds of sale and selling expense.

Foreign Property:

Did you or your spouse own foreign investments with a cost of more than \$100,000? Yes No

(i.e. Rental house in another country, US brokerage account, etc. does not include personal use property)

Medical Expenses:

Did you pay for private health plan fees (i.e. Blue Cross, travel insurance, etc.)? Yes No

If yes, provide copies of receipts.

Were you reimbursed by private health plan (i.e. Blue Cross)? Yes No

If yes, provide copies of receipts.

Are you claiming prescriptions with your medical expense claim? Yes No

If yes, provide a summary from the pharmacy rather than individual receipts

Digital News Subscription Tax Credit:

Did you subscribe to a digital news subscription in 2022? Yes No

If yes, please provide copies of your receipts.

Home Renovation Tax Credit:

Did you incur renovation expenses on your primary residence in 2022? Yes No

If yes, please provide copies of your receipts.

Underused Housing Tax:

The Canada Revenue Agency implemented an annual tax on the ownership of vacant or underused housing in Canada effective January 1, 2022. The tax usually applies to non-resident, non-Canadian owners however in some situations it also applies to Canadian owners and many situations have a requirement to file a return even if no tax is due. If you think this could apply to your situation, please discuss with your advisor. For more information see the following website:

<https://www.canada.ca/en/services/taxes/excise-taxes-duties-and-levies/underused-housing-tax.html>

Please provide any additional comments below: