



**Personal Tax Checklist**  
**2023**

**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):**

Married                  Divorced                  Single                  Separated                  Widowed                  Common Law

Date of 2023 change in marital status \_\_\_\_\_

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

**Children Born in 2023:**

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? (i.e. Rental house in another country, US brokerage account, etc. does not include personal use property)                  Yes                   No

**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 2023?                  Yes                   No   
 If yes, please provide copies of your receipts.

**First Home Savings Account:**

Did you or a member of your family open a first home savings account in 2023?                  Yes                   No   
 If yes, please provide names of the individuals who opened an account.

**Please provide any additional comments below:**