



Cawley • Curran • Wong & Associates
Brian Cawley Corporation

2023 PERSONAL INCOME TAX QUESTIONNAIRE

Client Name: _____

Telephone: () _____ Fax: () _____ E-mail: _____

Please indicate your address if it has changed since the 2022 income tax return:

* Marital status (if changed in 2023, indicate date of change) _____

I wish to receive my completed 2023 Tax Return and accompanying documents only by email in a PDF file (paperless option).

PLEASE CHECK ITEMS THAT YOU HAVE ATTACHED.

Income:

- Employment income - T4
- T4A for the Canada Emergency Response Benefit (CERB) and the Canada Recovery Benefit (CRB)
- Old Age Security - T4A (OAS)
- Other pensions - T4A
- Canada Pension Plan benefits - T4A (P)
- Retirement Income – T4A for pensions, T4RSP, T4RIF
(attach details of spouse's income to determine if pension splitting is beneficial).
- T4A for RESP withdrawals.
- Employment insurance - T4E
- Business or Professional - Financial statements or T5013 (Limited Partnership) or attach details of your income and expense numbers.
- Dividends and interest - T5
- Mutual funds, other Trust Income, Interest - Bank, Bonds - T3/T5/T600
- Limited partnerships - T5013
- Rental Property (attach details of income, expenses, purchases and sales)
- Alimony (provide copy of post-April 30, 1997 agreement or election, if not previously provided).

Capital gains/losses

- Did you dispose of any capital properties (principal residence, shares) this year (attach copies of sales detail and original purchase documentation)?
- Allowable business investment losses (i.e. Shareholder loans owing when the company is closed, investments that are worthless as the company has gone bankrupt etc.).
- Other income (e.g. stock options, gratuities, pensions, annuities, research grants and bursaries, lump-sum pension receipts, RRSPs - attach T4RSP, Workers' Compensation benefits).

Deductions:

- Details of purchase of your first home after January 27, 2009 – First-Time Home Buyers' Tax Credit (HBTC).
- RRSP (attach receipts; also attach T10-Personal adjustment reversal, if you have received one).
- Annual union and professional dues (attach receipts).
- Child care expenses (attach receipts)
 - for live-in child care, include name and S.I.N.
 - for summer camps, indicate the number of weeks in residence.
- Provide T4 Summary and T4 slip where you have an employer account for a nanny.
- Attendant care (attach receipts).
- Adoption expenses.
- Moving expenses (attach receipts). Indicate distance moved to new employment from old home and from new home.
- Alimony or separation allowances paid (include name(s) and address(es) of recipients; attach copy of agreement or court order for spousal support which was signed on or after May 1, 1997 or election).
- Commission and employment expenses (detail and form T2200 or TL2 are required).
- Carrying charges (interest on money borrowed to earn dividend and interest income, investment counselling fees, interest for limited partnerships, etc.).
- Other deductions and expenses (repayment of EI benefits, repayment of shareholder's loan, legal expenses to collect a retiring allowance or pension, legal expenses to appeal income tax assessments of previous years, etc.). Please attach all appropriate documentation and receipts.
- Federal and provincial political contributions (attach receipts).
- Charitable donations (attach receipts).
- Medical expenses (attach receipts) and details of private health insurance premiums.
- Tuition fees (attach T2202/T2202A including amounts which can be transferred from dependents).
- Interest paid on student loan (attach reporting slip).
- Labour sponsored funds – T5006.

Wholly dependent children:

- ❑ Please include name of child, address, relationship, birth date, S.I.N. and net income.
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Additional personal exemptions:

- ❑ If you are supporting other relatives who are living with you, provide the following information: name of relative, relationship, birth date, S.I.N. and net income.
 - ❑ Disability deduction (if first time, attach T2201 signed by physician)
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Other

- ❑ 2023 Tax Instalments paid. Please photocopy the reverse side of your March 2024 instalment page as this will show the total instalments that you paid for 2023.
- ❑ Attach copy of 2022 Notice of Assessment (this confirms numbers filed in your 2022 income tax return). This documentation should be 2-3 pages.
- ❑ Attach details of RRSP Home Buyers' Plan withdrawals and /or Canada Revenue Agency's statement of account - Home Buyers' Plan, if received.
- ❑ Bare Trusts – new reporting requirements will apply for “Bare Trusts”. These arrangements may include in-trust account set up by parent for a child' joint named banking/investment accounts and joint named properties ownership with non-beneficiaries owners. Please see further information on CRA website <https://www.canada.ca/en/revenue-agency/services/tax/trust-administrators/t3-return/new-trust-reporting-requirements-t3-filed-tax-years-ending-december-2023.html>