ANKLESARIA
CPA PROFESSIONAL CORPORATION

PERSONAL TAX CHECKLIST
2022 Taxation Year

Contact Person :		Preferred Method of Contact :	☐ Phone ☐ Email
Address :		Telephone :	( ) -
City, Province :		Email :	
Postal Code :			

Client: ______________ Date of birth: ______________ SIN: ______________	Spouse: ______________ Date of birth: ______________ SIN: ______________
☐Provide name to Elections Canada?	☐Provide name to Elections Canada?
☐Did you own foreign property with a cost >= CAD $100,000 in 2022?	☐Did you own foreign property with a cost >= CAD $100,000 in 2022?
☐Change in marital status on or before December 31, 2022	☐Change in marital status on or before December 31, 2022
☐Employment income (T4, T5018)	☐Employment income (T4, T5018)
☐Other employment income (severance, retiring allowance, tips, director fees, executor fees, etc.)	☐Other employment income (severance, retiring allowance, tips, director fees, executor fees, etc.)
☐Pension income (T4A, T4A(P), T4RIF, T4RSP, T4PS, foreign pension details)	☐Pension income (T4A, T4A(P), T4RIF, T4RSP, T4PS, foreign pension details)
☐Old age security (T4OAS)	☐Old age security (T4OAS)
☐Investment income (T3, T5, T5013)	☐Investment income (T3, T5, T5013)
☐Income from foreign investments or pensions	☐Income from foreign investments or pensions
☐Income or benefits from business where a relative is a key party?	☐Income or benefits from business where a relative is a key party?
☐ Income related to COVID-19 pandemic benefits (CERB, CRB, EI, CRSB, CESB, CRCB) – **see additional information on page 4**	☐ Income related to COVID-19 pandemic benefits (CERB, CRB, EI, CRSB, CESB, CRCB) – **see additional information on page 4**
☐Dispositions of investments or other assets incl. cryptocurrency, bitcoin, etc.	☐Dispositions of investments or other assets incl. cryptocurrency, bitcoin, etc.
☐Investment management fees paid	☐ Investment management fees paid
☐Interest paid to earn investment or business income	☐Interest paid to earn investment or business income
☐Spousal and child support payments paid/received	☐Spousal and child support payments paid/received
☐RRSP contributions on or before February 28, 2023	☐RRSP contributions on or before February 28, 2023
☐Medical expenses (list of eligible expenses can be found here: Eligible medical expenses	☐Medical expenses (list of eligible expenses can be found here: Eligible medical expenses
☐Adoption related expenses	☐Adoption related expenses
☐Charitable donations / political contributions	☐Charitable donations / political contributions
☐Home office deduction being claimed?	☐Home office deduction being claimed?
☐Training costs for work-related training not reimbursed by employer	☐Training costs for work-related training not reimbursed by employer
☐Tuition fees (T2202) – the back of the form must be signed for transfer	☐Tuition fees (T2202) – the back of the form must be signed for transfer
☐Scholarships, fellowships and bursaries received	☐Scholarships, fellowships and bursaries received
☐Interest paid on student loans	☐Interest paid on student loans
☐Professional / union dues	☐Professional / union dues
☐Childcare costs	☐Childcare costs
☐Canadian digital news subscription details or statement of costs	☐Canadian digital news subscription details or statement of costs
☐First time homebuyer in 2022?	☐First time homebuyer in 2022?
☐Moving expenses	☐Moving expenses
☐Renovations to improve home accessibility for disabled/seniors	☐Renovations to improve home accessibility for disabled/seniors
☐Property tax or rent paid details	☐Property tax or rent paid details
☐Claiming disability tax credit? **(Please mark yes if Type 1 diabetic)**	☐Claiming disability tax credit? **(Please mark yes if Type 1 diabetic)**
☐Employment expenses (T2200)	☐Employment expenses (T2200)
☐Business income and expenses (incl. Internet business, Uber, Lyft, Airbnb, VRBO, etc.)	☐Business income and expenses (incl. Internet business, Uber, Lyft, Airbnb, VRBO, etc.)
☐Rental income and related expenses	☐Rental income and related expenses
☐Sale of principal residence in 2022?	☐ Sale of principal residence in 2022?
☐Instalments paid in 2022?	☐Instalments paid in 2022?

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PERSONAL TAX CHECKLIST

(Additional Dependants – please make additional copies as required)

Dependant: ______________________
Date of birth: ______________________
SIN: ____________________________

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105 Consumers Drive, Whitby, ON L1N 1C4 Phone: 647-497-9774 Fax: 888-400-2986 Web: www.anklesaria.ca

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CPA PROFESSIONAL CORPORATION

PERSONAL TAX CHECKLIST
(CRA Correspondence)

Other Government Program Information

COVID-19 Benefits and Repayment Information

Please ensure you provide us with all income, support and benefits received under COVID-19 relief programs. Some of these benefits are taxable, while others are not. Official tax slips may have been issued for some, but not all. For support where no slip is available, details surrounding the amount and types of payment are required. Please provide details on all federal, provincial/territorial and other support received.

Key COVID-19 related federal personal support programs that are to be included as taxable income include:

Canada Recovery Sickness Benefit (CRSB), Canada Recovery Caregiving Benefit (CRCB), Canada Worker Lockdown Benefit (CWLB)

Key COVID-19 related federal government support for business, rental or other income that are to be included as taxable income include:

Canada Rent and Wage Subsidies, Canada Recovery Hiring Program (CRHP)

As no slips are provided for some of these programs, please provide the amounts received and the period to which they relate. Please also provide any details on any repayments of these benefits back to CRA.

Please also advise if you repaid COVID-19 support payments previously received. This includes both individual support benefits and benefits received in respect of a business. A deduction may be available in respect of the repayment.

Where a repayment was previously included in income (such as for CERB or CRB), the deduction can be claimed in the year the amount was originally included in income (2020, 2021 or 2022) or the year the repayment was made.

Students who incorrectly applied for Canada Emergency Response Benefit (CERB) when they should have applied for the Canada Emergency Student Benefit (CESB) can apply to offset CERB repayments with CESB that they would have been eligible for during the same benefit period. To qualify, the student must have filed their 2019 and 2020 personal tax return by the end of 2022.

Underused Housing Tax ("UHT") Information

The UHT imposes a national annual 1% tax on the value of non-resident (for immigration purposes), non-Canadian owned residential real estate considered to be vacant or underused. Legal ownership of real estate must be considered as of December 31, 2022, with filings and/or taxes first being due on April 30, 2023. If you believe this may be applicable to you, please contact us right away to help with this determination.

Canada Dental Benefit Information

The Canada dental benefit provides an up-front, tax-free payment to cover dental expenses for children under the age of 12 without dental coverage. The benefit is only available to families whose adjusted family net income is under $90,000. Applications for this benefit can be made online on CRA's My Account.

Canada Housing Benefit Top-up Payment Information

A one-time $500 tax-free payment would be provided to low-income renters (those who filed 2021 returns with adjusted net incomes below $35,000 for families or $20,000 for individuals). Applications for this benefit can be made online on CRA's My Account.

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(CRA Correspondence)

Canada Revenue Agency Correspondence

Requests for Information – Pre-Assessing and Post-Assessing Reviews

As an accounting firm that provides professional tax preparation services, we are required to file clients' returns electronically. As a result, your source documentation for the items reported on your tax return is not submitted to CRA when your return is filed. CRA may request that certain items be sent to them later for verification of the information included. We have found, historically, that approximately 10% of returns prepared are selected for these reviews. We will automatically respond to any requests we receive from CRA on your behalf unless you elect to receive and respond to these requests yourself below. Our standard fee to prepare the response and to review the subsequent correspondence **starts at $100 plus GST/HST** and is based on complexity and time spent to gather, assemble and submit the requested information.

☐ *I prefer to receive any CRA requests for information to be sent to me directly and will request assistance if needed.*

Manage Online Mail

CRA has a service called Manage Online Mail. This service will provide taxpayers with:

- ✓ Quick and convenient online access to Notices of Assessment/Reassessment; and
- ✓ Online access to future eligible correspondence as more becomes available electronically.

With your consent, we can register you for this service. To do so, we will require the email address that you wish to use to receive notifications from CRA.

☐ *I wish to have Anklesaria CPA Professional Corporation provide my email address to CRA for "Manage Online Mail".*

Client:		Email:	
Spouse:		Email:	
Dependant:		Email:	
Dependant:		Email:	

This is only an option for those individuals that have not previously registered for online mail. If you have already registered in the past, then you do not need to complete this again.

Direct Deposit

We have been encouraged by CRA to have clients enroll for direct deposit. If you haven't already enrolled, we can provide your banking information to CRA as part of the electronic filing process if this is your preference. As per CRA, "Direct deposit is a fast and convenient way for you to get your income tax refund and other credit and benefit payments directly into your bank account without having to wait for a cheque. Direct deposit costs less and is better for the environment too!"

Branch (5 digits): ☐ Institution (3 digits): ☐ Account (max. 12 digits): ☐

This is only an option for those individuals that have not previously registered for direct deposit. If you have already registered in the past, then you do not need to complete this again.

PERSONAL TAX CHECKLIST
(Additional Tools)

Additional Tools to Assist You

Reporting Self-Employment, Rental Property Activity, Home Office Deductions or Employment Expenses

If you report self-employment earnings or rental property activity, please see the Public Documents\Personal Tax Season folder in SmartVault for various Microsoft Excel templates for you to download and use at your convenience. The templates can be used to track the activity for the year and then summarize it in order to report it on your personal tax return for 2022. You will see the Public Documents folder when you first log in to SmartVault, before you access your own personal folder.

Estimating Your Fees to Prepare Your Personal Tax Return(s)

In the Public Documents\Personal Tax Season SmartVault folder, you can see a Microsoft Excel document called **Personal Tax Preparation Fee Estimator**. By filling in the details of your personal tax return(s), you can see an estimated fee range for us to complete your work. Note that this is an estimate only and actual fees are ultimately determined based on the complexity of the work, as well as the time and expertise required to complete your file. You should also note that this fee estimate is for the preparation of the return(s) only and does not include any subsequent correspondence with CRA on your behalf, or any tax planning advice that you may ask us to provide. Please take care to ensure you complete the appropriate tab (early filing discount, regular price, or corporate client) as the pricing differs depending on your status.

Online Access to CRA

You can register with CRA to view your personal tax account online. Through this service, you can approve our firm as your authorized representative, view Notices of Assessment, view certain tax slips issued to you, view your RRSP and TFSA contribution limit details, change your address, and phone number and set up direct deposit and/or pre-authorized debit, and much more. To register, go here and follow the instructions - My Account for Individuals - Canada.ca.

Paying Your Personal Tax Balance Online

One of the easiest ways to pay any balance owing is to use CRA's My Payment website. You indicate to CRA exactly what you wish to pay and the amount, and then it will allow you to pay your balance by Interac e-transfer, credit card, PayPal, and others. To use this service, go here and follow the instructions - Payments to the Canada Revenue Agency - Canada.ca.

Our Services

Visit our website here - Anklesaria CPA Professional Corporation - and click "What We Do" to learn about additional services that we provide to individuals, trusts, and corporations that go far beyond just the preparation of personal tax returns. We are a full-service accounting practice, serving a wide variety of clients, professions and industries and we would be pleased to discuss these services with you at your convenience.

SmartVault

As a valued client, we provide you a highly secure, password-protected portal to access and store your important financial documents from anywhere at any time. Whether you are at work, at home or traveling, you always have access to your tax returns and other documents. SmartVault is the smartest way to securely share your files online and is very user-friendly. For more information, please refer to the ***Working in SmartVault*** information sheet that is available in the public documents folder in SmartVault.

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