



# HORIZON GROUP

INSIGHTFUL  
GUIDANCE

CALGARY  
CANADA

ENDURING  
RESULTS

## PERSONAL TAX CHECKLIST

T1 Required for : \_\_\_\_\_

Phone (Cell): \_\_\_\_\_

Phone (□W□H): \_\_\_\_\_

NAME: \_\_\_\_\_

Address : \_\_\_\_\_

Birth date: \_\_\_\_\_ SIN: \_\_\_\_\_ Prior year info  Attached

Email: \_\_\_\_\_ Foreign Property over \$100,000?  Yes  No

Canadian citizen?  Yes  No

Marital status:  Single  Married  Other: \_\_\_\_\_ If changed, date of change: \_\_\_\_\_

**SPOUSE name:** \_\_\_\_\_ **SIN:** \_\_\_\_\_

Do we do your spouse's return?  Yes  No (If no, Spouse's net income from Line 23600 \_\_\_\_\_ )

Spouse's citizenship:  Canadian  Other: \_\_\_\_\_ Spouse's birth date: \_\_\_\_\_

**CHILDREN or infirm/disabled DEPENDANTS living with you?**  Yes  No **Child Care expns?**  Yes  No

Name(s)/ DOB/SIN \_\_\_\_\_  
(if necessary, list on other side)

### INCOME INFORMATION

- |   |  |  |
|---|--|--|
| <input type="checkbox"/> Employment (T4) incl. Tips \$ _____              | <input type="checkbox"/> Partnership (T5013)   | <input type="checkbox"/> Tax Shelters    |
| <input type="checkbox"/> EI Benefit (T4E)                                 | <input type="checkbox"/> Foreign Pension   | <input type="checkbox"/> Support payment |
| <input type="checkbox"/> Pension Plan, Other (T4A)                        | <input type="checkbox"/> <b>Sale/moved from Personal residence (&lt; than a year?)</b> |  |
| <input type="checkbox"/> RRSP withdrawal / RRIF (T4RSP / T4RIF)           | <input type="checkbox"/> Sale of other real Estate (Held less than a year?)            |  |
| <input type="checkbox"/> Investment income (T3/ T5)                       | <input type="checkbox"/> Sale of Personal Property                                     |  |
| <input type="checkbox"/> Estates / Trusts (T3s)                           | <input type="checkbox"/> Subcontract Payments (T5018)                                  |  |
| <input type="checkbox"/> OAS (T4AOAS) <input type="checkbox"/> CPP (T4AP) | <input type="checkbox"/> Home Buyer's Plan/LLP -income inclusion                       |  |
| <input type="checkbox"/> Employee Profit Sharings ( T4PS)                 | <input type="checkbox"/> Scholarships, Bursaries (T4A)                                 |  |
| <input type="checkbox"/> Social Assistances/ WCB (T5007)                  | <input type="checkbox"/> Other: _____  |  |

**STOCK INVESTMENTS? -**  Yes  N/A

Investment Statements  Trading summary  Gains/loss reports  Fees / Interest

**RENTAL ACTIVITY (Including AirBnB,VRBO etc) -**  Yes  N/A  **Short-term? (< 90 day rentals?)**

Property taxes  Insurance  Mortgage Interest  Utilities  Repairs  Purchase document

**BUSINESS ACTIVITIES? -**  Yes  N/A

Income  Expenses  Bank Statements  GST Registered  Auto  Home Office

### DEDUCTIONS THAT MAY APPLY:

- |   |   |
|---|---|
| <input type="checkbox"/> RRSP Contributions                   | <input type="checkbox"/> Medical Expenses (Pharmacies will provide list)                  |
| <input type="checkbox"/> Union /Professional Dues             | <input type="checkbox"/> Disability Tax credit  |
| <input type="checkbox"/> Employment expenses (T2200(s) reqd.) | <input type="checkbox"/> Home Accessibility Expenses (\$20,000 / year)                    |
| <input type="checkbox"/> Donations/Political Contribution     | <input type="checkbox"/> Multi-generational home renovation (\$50k life-time)             |
| <input type="checkbox"/> Tuition receipts (T2202A)            | <input type="checkbox"/> Child Support / Spousal Support                                  |
| <input type="checkbox"/> Moving Expenses (>40KMs)             | <input type="checkbox"/> 1st time Homebuyer (Didn't live in a house owned in prior 4 yrs) |
| <input type="checkbox"/> Northern Resident deduction          | <input type="checkbox"/> Student loan interest  |
| <input type="checkbox"/> Tradesperson tools                   | <input type="checkbox"/> First Home Savings Account ( <b>New for 2024</b> )               |

**Foreign Citizenship**  Yes  No

**US Real Estate Holdings**  Yes  No

**Any income received from related party (TOSI)**  Yes  No

**Notes:** \_\_\_\_\_