

Sladen *SM* Moore LLP

Chartered Professional Accountants

Vernon Office:
3005 35th Avenue
Vernon, B.C. V1T 2S9
Telephone: (250) 545-0754
Fax: (250) 545-8689

Partners:
Steve Cousins, CPA, CA, B.Comm.*
Courtney Satchell, CPA, CA, BBA*
Daniel Robert, CPA, CA, BBA*
Dustin Stadnyk, CPA, CA*

Lumby Office:
Box 610, 2041 Vernon St.
Lumby, B.C. V0E 2G0
Telephone: (250) 547-2118
Fax: (250) 547-2042

2023 PERSONAL INCOME TAX CHECKLIST

Information slips

- | | |
|---|--|
| <input type="checkbox"/> T4 – Employment income | <input type="checkbox"/> T3, T5, T5013, and T5008 – Investment and partnership income |
| <input type="checkbox"/> T4A, T4A(P), and T4(OAS) – Retirement/other, CPP, and OAS slips | <input type="checkbox"/> T5007 – Social assistance and Worker’s compensation |
| <input type="checkbox"/> T4E – Employment insurance benefits | <input type="checkbox"/> Any other T-slips |
| <input type="checkbox"/> T2202 or TL11 – Tuition | |

Receipts

- | | |
|--|---|
| <input type="checkbox"/> Charitable or political donations | <input type="checkbox"/> Professional or union dues (not included on T4) |
| <input type="checkbox"/> RRSP contributions | <input type="checkbox"/> Moving expenses |
| <input type="checkbox"/> Medical, medical travel greater than 40 km, and nursing home expenses | <input type="checkbox"/> T2200 – employment expenses, including school supplies and tool expenses |
| <input type="checkbox"/> Childcare expenses | <input type="checkbox"/> Home renovation/accessibility expenses |
| <input type="checkbox"/> Student loan interest | <input type="checkbox"/> Statement of adjustments from any property sales (including principal residence) |

Other information

- | | |
|---|--|
| <input type="checkbox"/> Prior year’s Notice of Assessment | <input type="checkbox"/> Rental property – income and expenses |
| <input type="checkbox"/> Other CRA correspondence | <input type="checkbox"/> Self-employed people and commissioned employees – income and expenses |
| <input type="checkbox"/> Dependent information | <input type="checkbox"/> Volunteer firefighter’s or Search and Rescue Certificate |
| <input type="checkbox"/> Capital gains information, if no T5008 | <input type="checkbox"/> Investment charges and interest expense from investing |
| <input type="checkbox"/> Child and/or spousal support | |
| <input type="checkbox"/> Disability Tax Credit (DTC) | |



CPA CHARTERED PROFESSIONAL ACCOUNTANTS

Members of
Chartered Professional Accountants of British Columbia

* Providing professional services through a corporation