



Caroline Perras

CHECKLIST – TAXES 2023

Non-exhaustive list - This list is to help you prepare your file.

You do not have to return it to us

WORKERS

- Record of Employment (T4 / RL-1 Slip, T4PS / RL-25 Slip). If you turned 60 or 65 years old during the year, your pay stubs for the pay period of your birth date.
- Other employment income, salary insurance, severance pay (T4A / RL-1 Slip).
- Construction Employees (RL-22 Slip).
- CNESST statement (T5007 / RL-5 Slip).
- Employment Insurance Statement (T4E).
- Professional or union dues other than on the T4.
- Meal expenses for truckers (TL2 / TP-66 signed by the employer as well as details of meal expenses).
- Employment Expenses such as car or office-in-home expenses#.
- Statement of Advance Payments for the Work Premium and the Canada workers benefit (RC410 / RL-19).
- Tips not reported on your RL-1 Slip.
- Tool expenses (tradespeople).
- Eligible expenses for school supplies for teachers and early childhood educators.
- Training expenses.

PERSONS OVER 65 AND/OR 70 YEARS OLD

- Statement of Old Age Security and Guaranteed Income Supplement (T4A (OAS)).
- Québec Pension Plan statements (T4AP / RL-2 Slip).
- Pension statements (T4A / RL-2 Slip).
- RRSP withdrawals, HBP (Home Buyer's Plan) (T4RSP / RL-2 Slip).
- RRIF withdrawals (T4RIF / RL-2 Slip).
- Home support charges for persons aged 70 and over (receipts if you are an owner, amounts paid for your rent if you are a tenant, RL-19 Slip for tenants of a serviced residence or copy of your lease and schedule to the lease, form TPZ-1029.MD.5 for condo owners).
- If you are over 65, have lived in your home for more than 15 years and have a family income of less than \$61,200: form issued by the municipality regarding the municipal tax increase credit.
- Fees for home accessibility or seniors' independence.

FAMILIES

- Québec Parental Insurance Plan statement (T4E / RL-6 Slip).
- Childcare receipts (RL-24 Slip or receipt with the name of the babysitter, his address and SIN). If you received advance payments, you must provide the RL-19 Slip.
- Receipts of physical and artistic activities for children.
- Adoption or treatment of infertility expenses.
- Mention any change of custody (father, mother or other) for each child.

STUDENTS

- Tuition Fees (T2202A / RL-8 Slip). *Do not forget to print them on your student portal.* If the fees are transferred to a parent, you must sign the appropriate section, often on the back of the T2202A.
- Interest on student loans.
- Scholarship statement and research grants.

INVESTORS

- Statement of Investments (T5 / RL-3 Slip, T3 / RL-16 Slip, T5008 / RL-18 Slip, documents concerning the purchase or sale of shares, foreign incomes, interests on income tax refunds). *The deadline for receipt for T3 is March 31.*
- RRSP and VRSP (wait for the receipts of the first 60 days of 2023), FHSA, Workers Fund, Capital regional et coopératif Desjardins.
- Financial expenses (interest paid to earn investment income, fees paid to an investment advisor).
- Sale of securities (T5008).
- Cryptocurrency or virtual currency transactions
- All information required when you have a capital gain or loss for OUT-RRSP or OUT-TFSA securities (analysis provided by your broker or cost and date of purchase of your securities).

OTHER DEDUCTIONS

- Solidarity Tax Credit: provide RL-31 Slip if you are a tenant or the registration number of your municipal tax bill if you are an owner.
- Charitable donations receipts.
- Political contributions receipts (federal and municipal political parties only).
- Medical expenses[#].
- Indicate if you purchased a first home (either via the client questionnaire or via Dimpo).
- Indicate if you sold your house[#].
- Mention if you are a caregiver even if the person receiving your help does not live with you.
- Mention if you have a physical limitation restricting you in your daily tasks (having difficulty to walk is the deduction most often forgotten).
- Volunteer firefighters and search and rescue volunteers (letter indicating your number of hours).
- Non-tax-exempt support paid.
- Certificate of compliance for the tax credit for the upgrading of residential wastewater treatment systems.
- Moving expenses[#].

OTHER INCOMES

- Statement of the SAAQ (RL-5 Slip).
- Social assistance record (T5007 / RL-5 Slip).
- Interest income (including those from tax refunds).
- Detail of non-tax-exempt support received.
- Rental income*. Include Desjardins dividends.
- Business income*.
- Foreign income (investments, pensions, etc.).
- Capital gains (sale of shares, sale of a second home, land, etc.).
- Do you own foreign goods totalling more than \$100,000 (real estate, share on the stock market)?

OTHER INFORMATION TO BE PROVIDED

- All documentation received from governments during the year.
- Check specimen if you want to register for direct deposit or if this is your first income tax returns.
- Instalments paid.

NOTES

* Please fill out the appropriate form by downloading it from my website (www.carolineperras.com). For business income, you can complete the dedicated form or attach your financial statements. If you're using the Dimpo platform to send us your documents, you can enter the required information directly on the platform.

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