



Taxpayer 1		Taxpayer 2 (Spouse/Common Law Partner)	
Name:	<input type="text"/>	Name:	<input type="text"/>
S.I.N:	<input type="text"/>	S.I.N:	<input type="text"/>
Date of Birth:	<input type="text"/>	Date of Birth:	<input type="text"/>
Address:	<input type="text"/>		<input type="text"/>
	<input type="text"/>	Home Phone #:	<input type="text"/>
Email:	<input type="text"/>	Cell Phone #:	<input type="text"/>
Marital Status:	<input type="text"/>		

Dependant's Name	Relationship	Date of Birth	S.I.N. #	Net Income

HOW WOULD YOU LIKE YOUR FINAL PAPERWORK SENT TO YOU?	Hard Copy	Digital Copy
1. I would like to receive my final paperwork in both hard and digital copy.		
2. I would like to receive my final paperwork in hard copy.		
3. I would like to receive my final paperwork in digital copy.		

Please review the listing and check off all items that apply to you (and your spouse/common law partner).

Did you repay any COVID-19 related income or benefits?	YES	NO
1. Did you receive any COVID-19 related income or benefits from any source?		
2. If yes, how much did you receive?		
3. How did you use the income or benefits?		
4. Did you use the income or benefits for any purpose other than repaying the loan?		
5. If yes, what was the purpose?		

Worked from home in 2022 due to the COVID-19 pandemic	YES	NO

Taxpayer 1		Taxpayer 2		Taxpayer 1	Taxpayer 2
OTHER		(Check for Yes)			
<input type="checkbox"/>	<input type="checkbox"/>	Copy of 2021 Notice of (Re)Assessment	<input type="checkbox"/>	<input type="checkbox"/>	Income tax instalments \$ _____
<input type="checkbox"/>	<input type="checkbox"/>	Direct Deposit my Refund (Void Cheque)	<input type="checkbox"/>	<input type="checkbox"/>	Spouse filing taxes somewhere else?
<input type="checkbox"/>	<input type="checkbox"/>	Are you a Canadian Citizen?	<input type="checkbox"/>	<input type="checkbox"/>	US Citizen or Green Card Holder?
<input type="checkbox"/>	<input type="checkbox"/>	Details of any Residence Sold in 2022 (Purchase cost and date, Sale price and date)	<input type="checkbox"/>	<input type="checkbox"/>	Did you spend more than 120 days in the U.S. during 2022? (Number of days: _____)
<input type="checkbox"/>	<input type="checkbox"/>	Do you authorize the CRA to provide information about you to Elections Canada?	<input type="checkbox"/>	<input type="checkbox"/>	List of Foreign Property Owned if Cost is Greater than \$100,000 CAD (T1135)

INCOME					
<input type="checkbox"/>	<input type="checkbox"/>	Employment Income (T4 or T4A slips)	<input type="checkbox"/>	<input type="checkbox"/>	Rental Income and Expenses
<input type="checkbox"/>	<input type="checkbox"/>	Pension Income (T4A, T4OAS, T4AP Slips or Foreign Pension Statement)	<input type="checkbox"/>	<input type="checkbox"/>	Capital Gains (T5008 slip, Trading Summary, or Cost and Proceeds)
<input type="checkbox"/>	<input type="checkbox"/>	Employment Insurance Benefits (T4E)	<input type="checkbox"/>	<input type="checkbox"/>	Self-Employment Income and Expenses
<input type="checkbox"/>	<input type="checkbox"/>	Investment Income - Interest or Dividends (T3 or T5 Slips)	<input type="checkbox"/>	<input type="checkbox"/>	Retirement Income (RRSP, RRIF, Annuity)
<input type="checkbox"/>	<input type="checkbox"/>	Partnership Income (T5013 Slip)	<input type="checkbox"/>	<input type="checkbox"/>	Other Income, Support Received, Death Benefits, Etc.

DEDUCTIONS AND CREDITS					
<input type="checkbox"/>	<input type="checkbox"/>	RRSP Contribution Receipts	<input type="checkbox"/>	<input type="checkbox"/>	Disability Claim (T2201 form)
<input type="checkbox"/>	<input type="checkbox"/>	Tuition Receipts (T2202 Form)	<input type="checkbox"/>	<input type="checkbox"/>	Charitable Donation Receipts
<input type="checkbox"/>	<input type="checkbox"/>	Medical Expenses	<input type="checkbox"/>	<input type="checkbox"/>	Student Loan Interest Statement
<input type="checkbox"/>	<input type="checkbox"/>	Child Care Expenses and Camps (Receipts)	<input type="checkbox"/>	<input type="checkbox"/>	Eligible Support Payments
<input type="checkbox"/>	<input type="checkbox"/>	Employment Expenses (T2200 or TL2 Form)	<input type="checkbox"/>	<input type="checkbox"/>	Property Tax or Rent Receipts
<input type="checkbox"/>	<input type="checkbox"/>	Union, Professional Dues, Teaching Supplies	<input type="checkbox"/>	<input type="checkbox"/>	First Time Home Buyer
<input type="checkbox"/>	<input type="checkbox"/>	Moving Expenses	<input type="checkbox"/>	<input type="checkbox"/>	Other Deductions (Carrying Charge, Interest, Etc.)

***If you have rental, self-employment/employment expenses, please email us at general@rjllp.ca for worksheets to aid in the summary of information**

WHAT'S NEW FOR 2023:

- 1) **Online access** – Starting in February 2022, the CRA will require taxpayers to provide their email address to use MyAccount as an additional security measure to protect taxpayers' personal information.
- 2) **COVID-19 Benefit Repayments** – The CRA will now allow you to deduct amounts repaid related to COVID-19 benefits in either the current year or the year in which you reported the benefits as income.
- 3) **Underused Housing Tax (UHT)** – The UHT imposes a national annual 1% tax on the value of non-resident, non-Canadian owned residential real estate considered to be vacant or underused. Many individuals exempt from the tax liability are still required to file a UHT return. The UHT went into effect on January 1, 2022, with filings and/or taxes first being due on April 30, 2023. **If you own a rental property please note you may be asked additional questions by our preparers at tax time, because you will likely need to file this return.**
- 4) **First-Time Home Buyers' Tax Credit** – the credit has been doubled; eligible home buyers will get access to a credit for \$1,500.
- 5) **Tax-Free First Home Savings Account (FHSA)** – The FHSA was introduced to help first-time home buyers save up to \$40,000 for a home purchase. Contributions to an FHSA are deductible (like an RRSP). Income earned in an FHSA and qualifying withdrawals from an FHSA made to purchase a first home are non-taxable (like a TFSA). The government expects that Canadians will be able to open FHSAs and begin contributing to them in mid-2023.
- 6) **Residential Property Flipping Rule** – All gains arising from the disposition of residential property (including rental property) owned for less than 12 months are business income unless select exceptions are met. This provision applies to transactions occurring on or after January 1, 2023. If you are selling a property or thinking of selling a property that you have owned for less than 12 months please contact your tax advisor.
- 7) **Multigenerational Home Renovation Tax Credit** – This new tax credit provides relief on up to \$50,000 of eligible expenses to construct a secondary suite for a senior or person with a disability to live with a relative, effective January 1, 2023.