



# Personal Income Tax Preparation

Use the checklist below to help you in preparation of your 2022 Personal Income Tax. Please ensure that you have collected all your tax information before you upload to the portal or drop off your information to our office.

## 1. Personal Information

Name, address, date of birth, SIN # and province of residence on December 31, 2022, if changed in the year.

If there has been a status change in the year, please provide the date of the change.

List of dependents/children including their income, birth date and SIN.

## 2. Sources of Income

Employment, Pension & Investment Income

Including: T3, T4, T4A, T4A(P), T4E, T4RIF, T4RSP, T5, T2200, T2202, T5018 and corresponding provincial slips.

COVID-19 related information – provide details on all support received and any details on any repayments of the benefits (individual support or benefits received in respect of a business).

**NEW!** 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.

For investments, provide us with the complete tax package from your investment advisor. T3 tax receipts are not required to be mailed out until March 31, 2023, which means they will not be received by you until the first week of April.

## 3. Business, Professional and/or Rental Income

A summary of income and expenses, including office in home expenses, summary of car expenses, kilometers driven and business portion, if applicable.

## 4. Sale of your Principal Residence

Please provide us with the date of acquisition, the sale price, and the municipal address of the property.

Did you own or hold foreign property (investment/real estate) at any time in 2022 with a total cost of more than CAN \$100,000? If unsure, please call us for further information.

Indicate if you have a change-in-use of your property. This could include, for example, converting some or all of your principal residence into an income-earning property, such as a rental suite. It could also include converting a property used for short-term rentals, such as Airbnb or VRBO, to long-term rentals.

## 5. Provide details and receipts for other deductions and tax credits

Alimony, separation allowances, child maintenance (including divorce/separation agreement).

Adoption related expenses

Charitable and political contributions

Childcare expense (Receipts must include name of child, SIN# and name, address, and signature of caregiver)

Disability supports expenses (speech, sight, hearing, learning aids for impaired individuals and attendant care expenses)

Details of any Dispositions of Capital Property (e.g., stocks, mutual funds, real estate) in 2022 including original cost and proceeds. The year-end transactions report from the investment advisor/fund company is required.

Employment Expense - summary of car expenses, number of kilometers driven and business portion.

Medical expenses - include receipts for premiums to medical insurance plans and request an annual summary from your pharmacy. **New!** certain costs reimbursed to surrogate mothers and for fertility, are eligible medical expenses.

Moving expenses

RRSP and any other pension plan contributions and withdrawals.

Professional and union dues

Tuition, Student Loan Interest, Rent  
Form T2202 for tuition must be signed by the student if transferring to parent. Rental receipts or letter from landlord showing the amount of rent paid for 2022 and address of rental unit are required.

Working from Home  
A deduction may be available if you qualify. Provide us with the number of days you worked from home in 2022

### New Credits/Deductions in 2022:

Air Quality Improvement Tax Credit

Canada Dental Benefit

Canada Housing Benefit Top-up Payment

Labour Mobility Deduction

Underused Housing Tax

**Please note:** We ask that you provide your information to us no later than April 17th. If you are not already registered to our secure portal, please contact the office to get your sign in details. Access the Hall & Associates Secure Login Portal [here](#)

If you have any questions, please contact the office at 613-389-8177 or email us at [info@hallcpa.ca](mailto:info@hallcpa.ca)