



PARKER PRINS LEBANO

Chartered Professional Accountants
Professional Corporation

IMPORTANT

2023 PERSONAL INCOME TAX QUESTIONNAIRE

In order to ensure our records are up to date, please confirm your personal information by completing Part 1 of this form for you (and your spouse, if applicable) immediately below. Please return this form with your tax documents.

PART 1 – Our default process for 2023 tax returns/letter/invoice delivery upon finalization will be electronic via our portal. If you do not wish to receive the tax information through the portal and you have not already indicated so, please let us know (below or) when you provide us with your tax information for 2023. If you have not yet established a portal link, please let us know and we will get that set up for you right away. Requests for secondary paper packages will be met at a later date and subject to an administrative charge unless you have no access to e-mail.

☐ I request a paper package in addition to my PDF package

☐ I request ONLY a paper package

Name(s) _____

Telephone () _____ Fax () _____ E-mail _____

Address (ONLY if changed since prior year) _____

Marital status (if changed during 2023 indicate date of change) _____

☐ If you are a first-time client of PPL, OR there are any changes for wholly-dependent persons, please attach a list and indicate for each dependent: name, address (if different), relationship, birth date, S.I.N., and net income. Note infirmity, if any.

Please check all items you have attached and that apply to you:

IMPORTANT FOR 2023

- ☐ ***Details of foreign property (including financial assets such as investment holdings) held, other than personal use property, if aggregate cost is in excess of \$100,000 at any time during the year.***
- ☐ ***Details of the sale of your principal residence if sold in 2023, including year of acquisition, proceeds of disposition, and the complete address of the property; if you purchased this property after December 31, 2022, please let us know the reason for disposition within the 12-month period.***

INCOME

- ☐ All T-Slips (i.e. T4, T4A(OAS), T4A(P), T4E, T5, T3, T5008, etc.)
- ☐ Interest, Dividends and other Investment Income – T5/T600
- ☐ Business or Professional – Financial Statements or T5013
- ☐ Rental Property (attach details of income, expenses, purchases and sales; if sold within 12 months of purchase, please let us know the reason)
- ☐ Capital Gains/Losses including trading of crypto-currencies (attach realized gain/loss report – **ask your broker if you have not received one**)
- ☐ Did you dispose of any capital properties this year? (Attach copies of sales detail and original purchase documentation)

over ➡

- ☐ Spousal support (provide copy of post-April 30, 1997 agreement or election, if changed or not previously provided)
- ☐ Other Income (e.g., stock options, annuities, scholarships, bursaries, research grants, RRSPs – attach T4RSP, Workers' Compensation benefits, foreign pension or investment income)

DEDUCTIONS

- ☐ Registered Retirement Savings Plan contributions for 2023 and the 1st 60 days of 2024 (attach receipts) (Attach T10 – Personal Adjustment Reversal, if you received one) and any information you have on use of the New Home Buyers Plan
- ☐ Annual union, professional dues (attach receipts if not on T4 slip)
- ☐ Child care expense (attach receipts)
 - (a) for individual providers, include S.I.N. and address
 - (b) for summer camps, indicate number of weeks that were overnight
- ☐ Attendant care expenses (attach receipts)
- ☐ Allowable business investment losses (refer to Capital Gains/Losses above)
- ☐ Moving expenses (attach receipts). Indicate distance moved to new employment _____
- ☐ Spousal support paid (include name(s), S.I.N., and address of recipient; attach copy of agreement or court order for spousal support which was signed on or after May 1, 1997 or election, if changed or not previously provided)
- ☐ Commission and employment expenses (include details and T2200 or TL2)
- ☐ Carrying charges on non-registered accounts (interest on money borrowed to earn taxable dividend and interest, investment counsel fees, interest for limited partnerships)
- ☐ Other deductions and expenses (attach receipts)
- ☐ Federal and provincial political contributions (attach receipts)
- ☐ Charitable donations (attach receipts) including details of donations of securities
- ☐ Medical expenses (attach receipts) and details of private health insurance premiums, including amounts paid while travelling. To avoid duplication of claims and the retrieval of multiple receipts, **you may wish to obtain a DETAILED annual summary from your service provider or insurer for the calendar year – in this case DO NOT also provide us with the individual receipts if included on the service provider/insurer's list**
- ☐ Disability deduction for you or dependent (if first time claim, attach T2201 signed by physician)
- ☐ Adoption expenses
- ☐ Tuition and examination fees (attach signed T2202/T2202A including amounts that can be transferred from dependents. **Please have the student sign the transfer portion of the form prior to submission.**)
- ☐ Interest paid on student loans (attach reporting slip)
- ☐ Receipts for home modifications if you are 65 or older, or an individual eligible for the T2201 (disability tax credit certificate). This is only applicable if the modifications specifically improve accessibility
- ☐ Confirmation statement/letter from your employer, and receipts for the Teacher and ECE School Supply Tax Credit

OTHER

- ☐ 2023 installments (attach February 2024 reminder notice – total for 2023 is on the reverse)
- ☐ Attach copy of 2022 notice(s) of (re)assessment
- ☐ Property tax amount for 2023 or receipt(s) for rent paid on primary residence
- ☐ Receipts for Canadian digital news subscriptions (**note – this must be a digital subscription**)
- ☐ Receipts for municipally-operated public transit (i.e. OC Transpo tickets, passes, etc.) in Ontario **if over age 65**
- ☐ If you and your spouse purchased your first home in 2023, please let us know

COMMENTS
