



Aries Accounting

#202 - 879 Anders Road
West Kelowna, BC V1Z 1K2
Phone: 250-454-9483

| | |
|-----------------|--|
| Office Use Only | |
| Client Number | |
| Date Received | |

2022 INCOME TAX CHECKLIST

Name: _____ Birthdate: yyyy/mm/dd _____ SIN: _____

Spouse Name: _____ Birthdate: yyyy/mm/dd _____ SIN: _____

Marital Status: Married / Single / Divorced / Separated /
Widowed / Common Law _____ Did this change in 2022? If yes, please provide date. _____

Address: _____

City: _____ Postal Code: _____

Primary Phone: _____ Did you move in 2022? Yes No

Email (yourself): _____ Do you work from home? Yes No

Email (spouse): _____ Does your spouse work from home Yes No

Dependant Information:

| Name | Birthdate | SIN | Gender |
|------|-----------|-----|---|
| | | | Male <input type="checkbox"/> Female <input type="checkbox"/> |
| | | | Male <input type="checkbox"/> Female <input type="checkbox"/> |
| | | | Male <input type="checkbox"/> Female <input type="checkbox"/> |

Income Sources

- | | |
|---|---|
| <input type="checkbox"/> Salaries, Commissions (T4, T4A) | <input type="checkbox"/> Taxable Capital Gains/Losses (investments, property) |
| <input type="checkbox"/> Pension Income (OAS, CPP, RIF) | <input type="checkbox"/> RRSP Income |
| <input type="checkbox"/> EI Benefits | <input type="checkbox"/> WCB Benefits |
| <input type="checkbox"/> Rental Income (*Add'l info required) | <input type="checkbox"/> Self-Employed (*Add'l info required) |
| <input type="checkbox"/> Investment Income (T3, T5 slips) | |
| <input type="checkbox"/> Investment Trading Report (Gain/Loss or T5008) | |

Deductions

- | | |
|---|--|
| <input type="checkbox"/> Childcare Expenses | <input type="checkbox"/> RRSP Contributions |
| <input type="checkbox"/> Teacher/Child Educator School Supply Tax Credit | <input type="checkbox"/> Union or Professional Dues |
| <input type="checkbox"/> Moving Expenses (*Add'l info required) | <input type="checkbox"/> Employment Expenses (*Add'l info required) |
| <input type="checkbox"/> Extended Health Benefits | <input type="checkbox"/> Investment Interest/Broker Fees |
| <input type="checkbox"/> Medical & Dental Expenses | <input type="checkbox"/> Education-Tuition Post Secondary (T2202 Slip) |
| <input type="checkbox"/> Charitable/Political Donations (Official Receipts) | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Interest Paid on Student Loans (Attach Stmt) | |
| <input type="checkbox"/> Disability Tax Credits (you, spouse, or children) | |

Other Information

- 2022 Instalments paid
- Notice of Assessment from 2021 (All pages)
- Prior year tax return (If this is the first year of Aries filing your taxes)
- RRSP Home Buyer's Withdrawal (Provide details)
- First Time Home Buyer (Provide legal documents – Statement of Adjustment)
- Northern Resident Deduction (Must have lived in prescribed zone for at least 6 months)
- Did you sell your home in 2022? We can provide a form for you.
- Are you 65 years of age or older and/or eligible for the Disability Tax Credit (DTC)?
- Did you perform renovations on your home to enhance mobility or reduce risk of harm? You may be eligible for the Home Accessibility Tax Credit (HATC) (provide all receipts)

Are you a Canadian Citizen? Yes No

Do you allow our office to access your information through the CRA Represent A Client? *A form will be required to sign upon pick up.* Yes No

Do you own foreign assets worth more than \$100,000? *This includes Investments. If yes, please provide details.* Yes No

Are you a US Citizen? *If yes, you may be required to file a US tax return.* Yes No

Were you **OR** your parents born in the US? *If yes, you may be required to file a US tax return.* Yes No

Would you like to receive our newsletters for tax tips and important information? Yes No

Are YOU registered for My Account with **CRA** or do you have a My Service Canada Account with **Service Canada**? Yes No

Is YOUR SPOUSE registered for My Account with **CRA** or do you have a My Service Canada Account with **Service Canada**?. Yes No

If no, would EITHER of you like to be registered for one? If yes, please ensure you have provided a valid email address for each family member who would like to register. An email with instructions will be sent to you. Yes No

Note that our office can assist with CRA requests for information after the personal tax return is filed for additional fees