

PERSONAL INCOME TAX INTAKE FORM

For additional information, please see the links provided on page 3

Taxpayer 1				Taxpayer 1			
First name				First name			
Last name				Last name			
Email				Email			
Phone				Phone			
SIN				SIN			
Birthdate				Birthdate			
Marital status				Marital status			
CDN citizen	Y: <input type="checkbox"/>	N: <input type="checkbox"/>	Salutation: <input type="text"/>	CDN citizen	Y: <input type="checkbox"/>	N: <input type="checkbox"/>	Salutation: <input type="text"/>
File U.S.A.	Y: <input type="checkbox"/>	N: <input type="checkbox"/>	State: <input type="text"/>	File U.S.A.	Y: <input type="checkbox"/>	N: <input type="checkbox"/>	State: <input type="text"/>
I can claim a disability tax credit:	Y: <input type="checkbox"/>	N: <input type="checkbox"/>		I can claim a disability tax credit:	Y: <input type="checkbox"/>	N: <input type="checkbox"/>	
I am a GST/HST registrant:	Y: <input type="checkbox"/>	N: <input type="checkbox"/>		I am a GST/HST registrant:	Y: <input type="checkbox"/>	N: <input type="checkbox"/>	
Please file my GST/HST return:	Y: <input type="checkbox"/>	N: <input type="checkbox"/>		Please file my GST/HST return:	Y: <input type="checkbox"/>	N: <input type="checkbox"/>	
I was a First Time Homebuyer in 2023:	Y: <input type="checkbox"/>	N: <input type="checkbox"/>		I was a First Time Homebuyer in 2023:	Y: <input type="checkbox"/>	N: <input type="checkbox"/>	
Update my file with Elections Canada:	Y: <input type="checkbox"/>	N: <input type="checkbox"/>		Update my file with Elections Canada:	Y: <input type="checkbox"/>	N: <input type="checkbox"/>	
Address							

Wholly Dependent Persons (If return required, please complete separate form, if not:)

	First Name	Last Name	Birthdate	SIN	Physical address (if different)
1					
2					
3					

	Relationship to Taxpayer 1	Line 23600 on tax return	Is there a custody arrangement?	Do you pay child support?	Tuition Slip (T2202 / TL11)	Transfer tuition to a parent?	Disability tax credit?
1							
2							
3							

To transfer tuition from a wholly dependent person, they must download and sign form T2202 (or request a form TL11A if the school is outside Canada). This information (and the student's line 23600 income for this year) must be on file to claim a tuition transfer. No other receipts are required or deductible.

Additional Information

Did your marital status change this tax year?	Y: <input type="checkbox"/>	N: <input type="checkbox"/>	If yes, date: <input type="text"/>
Did you own foreign property or investments costing CAD\$100,000 or more in the last year?			
Taxpayer 1:	Y: <input type="checkbox"/>	N: <input type="checkbox"/>	Taxpayer 2: Y: <input type="checkbox"/> N: <input type="checkbox"/>
If yes, please provide details: <input type="text"/>			
Did you/your spouse sell your home or any property in the last year? Y: <input type="checkbox"/> N: <input type="checkbox"/> If yes:			
Address of the property: <input type="text"/>			
Sale proceeds: <input type="text"/>		Year of purchase: <input type="text"/>	
Did you own any other personal use real estate at the same time? Y: <input type="checkbox"/> N: <input type="checkbox"/>			

First Home Savings Account (FHSA)

Did you open a FHSA in the current year?

Taxpayer 1: Y: N:

Taxpayer 2: Y: N:

If yes, did you make any contributions, transfers or withdrawals?

Taxpayer 1: Y: N:

Taxpayer 2: Y: N:

Please note which of the following details need to be included on your return(s):

Regular Income	Please provide	Taxpayer 1	Taxpayer 2
Employment income	T4	<input type="checkbox"/>	<input type="checkbox"/>
Employment insurance income	T4E	<input type="checkbox"/>	<input type="checkbox"/>
Other income/pensions	T4A	<input type="checkbox"/>	<input type="checkbox"/>
Canada Pension Plan benefits	T4A(P)	<input type="checkbox"/>	<input type="checkbox"/>
Old Age Security benefits	T4A(OAS)	<input type="checkbox"/>	<input type="checkbox"/>
RRSP withdrawal	T4RSP	<input type="checkbox"/>	<input type="checkbox"/>
RRIF withdrawals	T4RIF	<input type="checkbox"/>	<input type="checkbox"/>
Worker's comp and social assistance	T5007	<input type="checkbox"/>	<input type="checkbox"/>
Advanced Canada workers benefit benefits	RC210	<input type="checkbox"/>	<input type="checkbox"/>
Spousal support income	agreement/receipts	<input type="checkbox"/>	<input type="checkbox"/>
Business or partnership income	Self-employment Worksheet	<input type="checkbox"/>	<input type="checkbox"/>
Foreign income (<i>pensions, employment, etc.</i>)	details	<input type="checkbox"/>	<input type="checkbox"/>

Investment Income

Trust/mutual fund income	T3	<input type="checkbox"/>	<input type="checkbox"/>
Interest, dividend, or capital gains income	T5	<input type="checkbox"/>	<input type="checkbox"/>
Limited partnership Income	T5013	<input type="checkbox"/>	<input type="checkbox"/>
Rental property income	Rental Worksheet	<input type="checkbox"/>	<input type="checkbox"/>

Capital Gains and Losses

Investment sales (<i>non-registered</i>)	T5008/summary	<input type="checkbox"/>	<input type="checkbox"/>
Real estate sales	legal documents	<input type="checkbox"/>	<input type="checkbox"/>

Deductions & Credits

Spousal/child support paid	agreement/receipts	<input type="checkbox"/>	<input type="checkbox"/>
RRSP contributions	contribution receipts	<input type="checkbox"/>	<input type="checkbox"/>
First Home Savings Account contributions	T4FHSA	<input type="checkbox"/>	<input type="checkbox"/>
Union/professional dues	receipts	<input type="checkbox"/>	<input type="checkbox"/>
Eligible moving expenses (<i>see link below</i>)	summary/receipts	<input type="checkbox"/>	<input type="checkbox"/>
Employment expenses	Employment Worksheet	<input type="checkbox"/>	<input type="checkbox"/>
Interest on borrowing to invest (<i>non-registered</i>)	interest confirmation	<input type="checkbox"/>	<input type="checkbox"/>
Investment management fees (<i>non-registered</i>)	broker summary	<input type="checkbox"/>	<input type="checkbox"/>
Issue cost amortization for limited partnerships	summary	<input type="checkbox"/>	<input type="checkbox"/>
Medical expenses and attendant care costs	summary/receipts	<input type="checkbox"/>	<input type="checkbox"/>
Multigenerational home renovation expenses	receipts	<input type="checkbox"/>	<input type="checkbox"/>
Ontario senior public transit expenses	receipts	<input type="checkbox"/>	<input type="checkbox"/>
Ontario seniors care at home expenses	receipts	<input type="checkbox"/>	<input type="checkbox"/>
Home accessibility expenses	receipts	<input type="checkbox"/>	<input type="checkbox"/>
Digital news subscription expenses	receipts	<input type="checkbox"/>	<input type="checkbox"/>
Rent/property taxes on primary residence	receipts	<input type="checkbox"/>	<input type="checkbox"/>
Charitable donations & political contributions	summary/receipts	<input type="checkbox"/>	<input type="checkbox"/>
Tuition fees	T2202/TL11A	<input type="checkbox"/>	<input type="checkbox"/>
Childcare expenses	receipts	<input type="checkbox"/>	<input type="checkbox"/>
Interest paid on student loans	T5006	<input type="checkbox"/>	<input type="checkbox"/>

CRA Instalments

Did you make any instalments to CRA in the current year?			
Taxpayer 1:	Y: <input type="checkbox"/>	N: <input type="checkbox"/>	Taxpayer 2: Y: <input type="checkbox"/> N: <input type="checkbox"/>
If yes, what was the amount?			
Taxpayer 1:	<input type="text"/>	Taxpayer 2:	<input type="text"/>

Ontario Trillium Benefits Application (for primary residence)

If you paid rent:	If you paid property tax:
Rent paid: <input type="text"/>	Tax paid: <input type="text"/>
# months: <input type="text"/>	# months: <input type="text"/>
Landlord(s): <input type="text"/>	Municipality: <input type="text"/>
Is this a long-term care home? Y: <input type="checkbox"/> N: <input type="checkbox"/>	
Address: <input type="text"/>	Address: <input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

Notes to the Tax Team

For more information

- [2023 Federal Income Tax and Benefit Guide](#)
- [CRA Guide to the Disability Tax Credit](#)
- [CRA Guide to Medical Expenses](#)
- [CRA Guide to Moving Expenses](#)
- [CRA Guide to the Home Accessibility Tax Credit \(HATC\)](#)
- [CRA Guide to the Digital News Subscription Tax Credit](#)
- [CRA Guide to the Canada Caregiver Amount](#)
- [First Home Savings Account \(FHSA\)](#)
- [Multigenerational Home Renovation Tax Credit \(MHRTC\)](#)
- [Ontario Tax Information for 2023](#)