

Information we are waiting for:

Questions:

2023 TAX YEAR - Client Information

Best e-mail address _____ **T183 signed** _____ **T1032 signed** _____

Names _____

Address _____

(cell His) _____ **(cell Hers)** _____ **Ph.(hm/wk)** _____

Indicate best # to call by *

Amount of On. rent paid _____ **Amount of Prop.tax paid** _____

Did you sell any property during the year? _____ **Yes / No**

Tax Credits & Deductions to Consider: (circle any that are applicable)

RSP contributions, tuition(T2202A), charitable donations, interest on student or investment loans, union or professional dues, moving expenses*** (We require receipts for each of the previous)***

Home office(T2200 required), child care & sports camps, spousal support paid or received, teacher's supplies, first time home buyer, volunteer firefighter, public transit passes (65 and older), home renovations safety expenses for seniors, Medical expenses (You must fill in "Medical expenses Paid" form from our downloads at faganely.com. Instructions are on the form)

Disabilities, infirm and caregiver credits- Please inform Tom of any disabilities in the family and if assistance is given to family members

New For 2023

Multi Generation Tax Credit-Renovations done to your home to add a unit for a related senior or disabled person. (up to \$50,000)

First Home Savings Acct.(FHSA) – up to \$8,000 per year

No longer available – Ontario Staycation tax credit (for hotels and campground fees)

Home Office Expenses – Must have a T2200 filled in by employer

Please indicate any changes from last year such as marital status, new dependents, rental income, or employment expenses.

Do you authorize CRA to share your information to be contacted about organ donation Yes / No
Is it ok to give your names, address and DOB to Elections Canada? _____ Yes / No

Do you have any foreign investment worth over \$100,000 Canadian? _____ Yes / No

Do you authorize pension splitting if either of you collect a pension? _____ Yes / No