

2023 Tax Year Checklist

EXISTING CLIENTS

Important changes:

- Do you share a bank account with your parents/children or are you on title to a home with your parents/children? If so, please let us know. There are new CRA reporting rules.
- BC's Renters Tax Credit – Are you eligible? See below property details.

Please note:

- If you plan to come by the office to drop off your taxes, please call to arrange a time.
- If you have donations or medical receipts, please add up the totals and note it on top of the stack of receipts.
- We are on a new 3-week turnaround schedule.
- Please submit your tax documents electronically (by email or fax).
- If you have a non-registered account at YF, please forward your taxes **after** April 1st 2024.
- Do you have a non-registered account outside of YF? Please provide copies of your gain/loss statement.

We generate PDF returns. Paper copies are an extra \$5. PAPER ☐ Mail to my home (~\$4) ☐ Express Post \$24 ☐

YOUR INFO

Your Name	Phone
Spouse Name	Spouse Phone

ANY CHANGES SINCE LAST YEAR?

Your Name	Your SIN
Spouse Name	Spouse SIN/DOB
Your Email	Spouse Email
Address for Tax Return:	

LIVING IN BC on December 31 st , 2023? Yes <input type="checkbox"/> No <input type="checkbox"/> If not, where:
MARITAL STATUS: Single <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> Divorced <input type="checkbox"/> Common Law <input type="checkbox"/> Date of Change [d/m/y]:
CANADIAN CITIZEN? Yes <input type="checkbox"/> No <input type="checkbox"/> SPOUSE CANADIAN CITIZEN? Yes <input type="checkbox"/> No <input type="checkbox"/>
FOREIGN PROPERTY / INVESTMENTS more than \$100,000 Canadian \$
SOLD PROPERTY? Please complete our new Home Sale Checklist
BOUGHT PROPERTY? Yes <input type="checkbox"/> No <input type="checkbox"/> Purchase \$
RENTER & FAMILY INCOME IS \$80,000 OR LESS? Yes <input type="checkbox"/> No <input type="checkbox"/>
IF YES, PROVIDE # OF MONTHS _____ AT THIS ADDRESS _____ IN 2023
FULL NAME OF COMPANY OR LANDLORD YOU PAY RENT TO _____

IF WE ARE NOT DOING YOUR SPOUSE'S TAXES

Spouse Name	2023 Estimated Earnings \$
-------------	----------------------------

DEPENDENTS

Name / DOB / SIN	Name / DOB / SIN
Tuition	Tuition
Childcare Expenses	Childcare Expenses
Disability Tax Certificate? Yes <input type="checkbox"/> No <input type="checkbox"/>	Disability Tax Certificate? Yes <input type="checkbox"/> No <input type="checkbox"/>

OTHER DOCUMENTS / RECEIPTS in addition to the regular T-Slips, please provide:

Union Dues	T5008 (gain/loss)	Dec. 31 Investment Statements [gain/loss]
T2200 [employment expenses]	Commissions [NOT on T4]	Spousal Support Paid/ Received /Taxed?
T2202 (tuition receipt)	Server Tips \$	YF Checklists (Moving/Rental/Medical)
Student Loan Interest Paid	Donations	Regular T-Slips: T4, T4A, T3, T5, T4RSP, T4RIF, T4OAS, T4AP

PRICING – see Pricing Sheet