



Licensed Insolvency Trustees

E-MAIL: tax@hoyes.com
FAX: 1-888-553-5519
MAIL: #2A-800 King St. West
Kitchener, ON N2G 1E8

2023 INCOME TAX CHECKLIST

Please complete this form and return to us so that we can prepare your tax return for 2023. There is normally a delay in Canada Revenue Agency assessing returns for people in bankruptcy, so please provide your information as soon as possible.

Name: \_\_\_\_\_

Marital status as of Dec. 31, 2023 and date of change if different than previous year. \_\_\_\_\_

If spouse's tax return not being prepared by trustee,

Spouse's Name: \_\_\_\_\_ SIN: \_\_\_\_\_ Net income for 2023 (line 23600): \_\_\_\_\_

Do you claim the Disability Tax Credit? If so, indicate if for yourself, spouse or a dependant. \_\_\_\_\_

Province of residence as of Dec. 31, 2023 and date of change if different than previous year. \_\_\_\_\_

Address of Dec. 31, 2023.

To receive the Ontario Trillium Benefit, provide documentation for rent or property taxes paid in 2023 (receipt, landlord letter). If no receipt is available, indicate in the field below the details of how much was paid, to whom the payments were made, and the address to which the payments relate.

Specify name and date of birth for Children under age 18 living with you as of Dec. 31, 2023 and that you claim as a dependant.

Below is a list of common tax forms and documents. Please indicate which items are applicable to you and submit to the tax department along with this completed form. Original documents are not required. Please wait until you have collected all of your documents before sending to us.

- Employment income T4
Employment insurance T4E
Other income or pensions T4A
Canada pension plan T4A(P)
Old age security T4A(OAS)
Social assistance or WSIB T5007
RRSP/RRIF withdrawals T4RSP or T4RIF
Interest and dividend income T3 or T5
Securities transactions T5008
Advanced Canada workers benefit statement RC210
Amount of spousal support paid or received
Summary of instalment payments made to CRA

- Summary of employment expenses T2200/T2200S
Tuition/Education certificate T2202
Union and professional dues
Charitable donation receipts
Child care receipts
RRSP contributions and HBP repayment amount
Interest paid on student loans
Summary of medical receipts
Summary of moving expenses
Summary of self-employment income and expenses
Summary of rental property income and expenses
Summary of real estate dispositions (address, proceeds, legal costs, date and original cost of acquisition)