

# Taxes4u.ca

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Website: [www.taxes4u.ca](http://www.taxes4u.ca) Phone: 6472911461

Hi,

Re: Information Request for Your 2023 Income Tax and Benefit Return (T1)

## Part A: All your Income slips, Investments slips and Tuition fees for 2023

It is the time of the year to gather information and prepare for your personal income tax return for the 2023 tax year. In order for us to prepare your 2023 income tax return, please provide the following income tax slips for the 2023 tax year (if applicable), the corresponding provincial slips, and any other slips that you have received for the year.

1. **T4**: Statement of Remuneration Paid
2. **T4A**: Statement of Pension, Retirement, Annuity, and Other Income
3. **T4A(OAS)**: Statement of Old Age Security (OAS)
4. **T4A(P)**: Statement of Canada Pension Plan Benefits
5. **T4A-RCA**: Statement of Distributions from a Retirement Compensation Arrangement (RCA)
6. **T4E**: Statement of Employment Insurance and Other Benefits
7. **T4PS**: Statement of Employee Profit-Sharing Plan Allocations and Payments
8. **T4RIF**: Statement of Income From a **Registered Retirement Income Fund**
9. **T4RSP**: Statement of **RRSP** Income
10. **T5**: Statement of Investment Income
11. **T5007**: Statement of **Benefits**
12. **T5008**: Statement of **Securities**
13. Transactions T5013: Statement of **Partnership Income**
14. **RC210**: Canada Workers Benefit Advance Payments Statement
15. **RRSP**: Registered Retirement Savings Plan (RRSP) contributions made between March and December of 2023, or during the first 60 days of 2023+1
16. **T2202: Tuition** and Enrolment Certificate
17. **TL11A/C/D: Tuition** and Enrolment Certificate - **University Outside Canada** / Commuter to the United States / Educational Institutions Outside Canada for a Deemed Resident of Canada (if applicable)

## Part B: All your business activities, Foreign Incomes and Other expenses

In addition, please provide us with the following information for the 2023 tax year (if applicable):

1. **Notice of (Re)Assessment(s)** (NOA) for the previous tax year
2. Statements for **your investments** (shares, mutual funds, bonds, debentures, promissory notes, etc.) for any dispositions in the year
3. Information for any **other dispositions** (real estate, depreciable properties, qualified farm or fishing properties, qualified small business corporation shares, etc.)
4. Income and expenses from **business or professional** activities
5. Income and expenses from **rental activities**
6. **Foreign income** (employment, investment, pension, etc.), capital gains or losses, foreign taxes paid, etc. Employment expenses

## Part C: Other expenses

1. **Medical expenses** for yourself, and your spouse or common-law partner (if applicable)  
Medical expenses for dependents
2. Official tax receipts for **donations** made by yourself, and your spouse Receipts for political contributions made in the year (if applicable)
3. Receipts and/or statements for the amounts paid regarding **rent or property tax** Federal and/or provincial tax instalments made
4. Employment expenses, if you are commissioned employee or contractor or work from home.
5. **Annual union, professional, or like dues**
6. Carrying charges and **interest expenses**
7. **Seniors home safety:** If you spent money to make home safe and you are a above 65 years or older, please provide that amount.
8. Covid 19: **Benefits Repayment** please provide repayments amount.

## Part D: General Information

### Are you are filing tax with us for the first time? Please provide below information

1. Your Full Name
2. SIN No.
3. Address
4. Marital status
5. Date of Birth
6. Dependents (e.g. new child, parents or other dependants supported by you) Name, Relation, Date of Birth and relation
7. Residency status (if changed in 2023/date of landing)
8. Direct deposit information (if you want to get refund directly to bank account)

### Worked with us Before, please provide below information, only if updated from last tax year:

Please notify us and provide information if any of the following has changed from prior year:

1. Name Change
2. SIN No. (changed from temporary to permanent)
3. Date of Birth
4. Address
5. Marital status
6. New Dependents information (e.g. new child, parents or other dependants supported by you) Name, Relation, Date of Birth and relation
7. Residency status changed?
8. Direct deposit information (if you want to get refund directly to bank account)

If you have any questions about your income tax returns, please contact me at 6472911461

Sincerely,

*Iti Patel CPA, CA, MBA*