All Taxpayers Checklist
2022 Tax Year

The following checklist is a reference to help you in gathering items needed to prepare your 2022 personal income tax return.

- ☐ A copy of your last year's Notice of Assessment, if readily available
- ☐ Tax Instalment Notice from the Canada Revenue Agency confirming total paid for the 2022 tax year
- ☐ 2022 Property Tax Statement and receipts and/or rental receipts for your personal dwelling
- ☐ Income slips, as listed, on your Client Information sheet (ie. T3, T4, T5, etc.) Make note of any changes, deletion of or addition of slips, on this form.
- ☐ Year end investment packages (this will provide us with gains/losses and management fee reporting)
- ☐ Other pertinent income slips – T5007 (social assistance or WCB)
- ☐ Medical expenses - Refer to our website for a medical expense form to complete and return with your receipts
- ☐ Official charitable donation and child care receipts
- ☐ Official receipts for union dues, professional dues, T2202 (tuition) slip, student loan interest and RRSPs
- ☐ Consumable supplies invoices (for Teachers and Early Childhood Educators)
- ☐ Travel expenses for tradespeople in construction industry who travel for work.
- ☐ Details on changes in dependants and earnings of dependants
- ☐ Changes in mailing address, contact information (telephone and email), name changes, marital status changes and if a baby has been born in 2022 (include name, gender, and date of birth). Make changes to the Client Information sheet enclosed.

Important Notes:

1. Registered Retirement Savings Plan contributions must be made by March 1, 2023 to be eligible for a deduction on your 2022 personal tax return. If you need tax planning advice regarding RRSPs, please have your books to us by February 10 and clearly indicate that you require RRSP advice.
2. Do not separate any income slips – all slips will be returned to you.
3. Referring to your prior year income tax return can assist you with knowing what was claimed previously and what slips/documents to bring in this year.
4. This year we have included a Client Information sheet to aid in the compiling of documents for your T1 return. Please use this sheet, change any information that is incorrect, and return it to our office with your slips.

ALLIANCE
ACCOUNTING GROUP
CHARTERED PROFESSIONAL ACCOUNTANTS INC.