Personal Income Tax Return for the Year 2023

Canham Rogers is pleased to complete your personal income tax return - in order to minimize your tax liability and to ensure that your return is filed promptly, please email us PDFs of the info below at least 3 weeks before the April 30th, 2024 filing deadline.

CRA Link: Do you have to file a Personal Tax Return

Canham Rogers Private Library

Tax Slips and Receipts

Please forward all government tax slips received - the most common are listed below:

T3	Trust Income	**T5008**	Security Sales & Tax package from broker
T4	Employment Income	**T2202a**	Tuition Receipts
T4A	Pension Income	**T1137**	Home Buyers Plan Statement
T4A(OAS)	Old Age Security	**INNS2**	Tax Installments paid
T4A(P)	CPP Benefits		
T4RSP	RRSP Income	**Receipts:**	Charitable Donations
T4E	Employment Insurance		Child Care Expense Receipts
T4RIF	RRIF Income		Medical Expenses
T5	Interest and Dividend Income		Political Donations
T5013	Partnership Income		RRSP Contributions

Additional Information

In addition to the above, please forward to us any information on the areas below:

1. Have you moved? New Address: _____

2. Ontario Property Taxes or Premises Rent paid during the year (ONBEN): $ _____

3. Interest expense on Investment loans paid during the year: $ _____

4. Support payments from or to past spouses: $ _____ (Paid during the year) $ _____ (Received during the year)

5. Please contact us if you might qualify for: 2023 Home Buyers Amount ($10K credit)

6. Capital Gains and Losses: **Reqd for all stock sales during the year: Name of stock, Date of Sale, Number of shares sold, Total selling price of the shares (after commissions), Date of purchase, Total purchase price including commissions. All amounts must be in $CDN currency.**

Selected Special CRA Forms

Please do not send us any receipts for the below items - only the completed forms or summary info in an email or spreadsheet is required if any of these apply to you:

T2125	Unincorporated business either as a sole proprietorship or as a partnership.
T776	Rental Property Income/Loss.
T1135	Individuals who held certain foreign property at any time during the year with a total cost of more than CAN $100,000 must complete this form and forward to CRA with a copy to us. This generally excludes RRSP assets and property held solely for personal use. This form must be filed separately from the Tax Return.
S3	NB: Please notify us of any Sale of a Principal Residence in this tax year. Information re year of acquisition and sale price must be reported to CRA.

Employment T4 - Home Office Expense Claims - 2023 Personal Tax Return

Option#	Method	Minimum Home Work Required	Employer Signature Required on:	Employee Tax Form Required	Receipts Required to be Maintained by the Taxpayer?	Option#
#1	COVID-19, detailed	>50% of at least 1 month of 2023	**T2200S**	**T777S**	Yes	#1
#2	Traditional, detailed	>50% of **ALL** 2023 Work Time	**T2200**	**T777**	Yes	#2

For claiming home office and/or all other employment expenses. The temporary flat rate method does not apply to the 2023 tax year.