

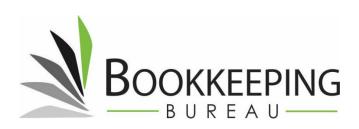
2023 Personal Income Tax Info

Please complete all sections where there have been changes PLUS all mandatory (*) fields.

TAXPAYER'S INFORMATION							
		Date of Birth	YYYY/MM/DD				
SIN:							
*Marital Status:							
*Did your status change in 2023	Y □ N □	Date of Change	VIDAY IS AND IDD				
Are you a US Citizen	Y 🗆 N 🗆		YYYY/MM/DD				
SPOUSE'S INFORMATION							
Name:		Date of Birth					
SIN:			YYYY/MM/DD				
Net Income (if filing separately): \$							
DEPENDANT'S INFORMATION							
Name:	M □ F □	Date of Birth:					
		-	YYYY/MM/DD				
Name:	M □ F □	Date of Birth:	YYYY/MM/DD				
Name:	M □ F □	Date of Birth:					
			YYYY/MM/DD				
CONTACT INFORMATION							
		*					
Address:		*Phone / Cell:					
		Work: ∗					
City / Province:		*Email:					
Postal Code:		Spouse's Email:					

*	PRINCII	PAL	RESIDENCE			*TAX CREDITS / DEDUCTIONS		
	d you sell	-	r principal residence	Y 🗆	N 🗆	Charitable Donations: Y □ N □		
IF YES Sale Price: \$				Child Care Expenses: Y □ N □				
			Date of Purchase:			Employment Expenses: Y \(\subseteq \text{N} \simplify \text{N} \subseteq \text{N} \simplify \text{N} \simpl		
Has there been any change in the use of your principal residence? (ie. Rental)		Υ 🗆	N□	Medical and Dental Expenses: Y \square N \square				
						Membership Dues: Y □ N □		
*	OTHER	INFC				RRSP Contributions: Y \square N \square		
			eign property at any time	J		Tuition Fees: Y \(\subseteq \ N \subseteq		
during the year that was worth more than \$100,000, including investments?		Y 🗆	N□	Do you claim the disability amount? Y \square N \square				
	Rental Income: (attach statement of rental income)		Y 🗆	N□	If yes, is this the first year that it is being claimed? Y \Box N \Box			
(α.					Property Taxes / Rent Paid: \$			
Self Employed: (attach statement of business income)		Υ 🗆	N □	Tax Paid by installments: \$				
*Q	UESTIO	NS T	O ANSWER					
Y	N							
		1.	Did you receive interest, dividends , or benefits from a business in which a relative is a key party (in terms of ownership or involvement)?					
		2. Are you or any of your dependants disabled ? If so, provide Form T2201, Disability Tax Credit Certificate.						
			disabled person? Tax planı Plan. Persons with disabili textbooks, etc.) incurred fo	ning opporto ties may also or the purpo	unities may be no receive tax nose of emplo	ent relatives. In addition, are you, or would you like to provide support to a be available, such as the establishment of a Registered Disability Savings a relief for the cost of disability supports (e.g. sign language services, talking the cost of the cos		
		3.	Are you the caregiver for any infirm family members? Did you provide in-home care for an infirm dependent relative?					
		4.	Did you provided in-home care for a parent or grandparent (including in-laws) 65 years of age or over, or an infirm dependen relative? A federal tax credit may be available. Certain provincial credits may also be available. Also, the caregiver may claim related training costs as a medical expense credit.					





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Υ	N		
		5.	If you have children up to the age of 17, have you received Canada Child Benefit (CCB)?
		6.	Did you purchase a new home in 2023? If so, you may be eligible for the residential property GST/HST rebate . Also, are you a first-time home buyer in 2023? A federal tax credit based on \$10,000; may be available.
		7.	Are you a U.S. citizen, Green Card Holder , or were you, or your parents born in the United States ? You may have U.S. filing obligations.
		8.	Have you spent more than 200 hours acting as a volunteer firefighter or a search and rescue volunteer ? You may be eligible for a federal tax credit.
		9.	Are you an aboriginal person? Special tax rules may apply.
		10.	Do you authorize CRA to give your name, address, date of birth, and citizenship to Elections Canada to update the National Register of Electors?
		11.	Have you made any contributions to a gifting tax shelter?
		12.	Did you receive any significant prizes or awards from your, or a related person's place of employment?
		13.	Did you receive a retroactive lump-sum payment over \$3,000 (for example, spousal support)? In certain cases, some tax relief may be available.
		14.	Have you organized or managed a crowdfunding campaign ? In some cases, there are tax implications.
		15.	Other provincial and territorial tax credits may be available in your jurisdiction such as certain property taxes and residential rent paid in Ontario.
		16.	Do you have a will? When was it last updated?
		17.	Underused Housing Tax – New: Do you own an interest on the title of a real property on behalf of a child, parent or other family member or through a private corporation? (Example: a 1% interest to facilitate financing?) If so, you may be required to file the new UHT-2900 Underused Housing Tax Return and Election form. Significant penalties apply for non-compliance.
		18.	Do you authorize CRA to provide to provide you name and email address to Ontario Health so that Ontario Health (Trillium of Life) may contact or send information to you about organ and tissue donation?

NOTE: you are **not** consenting to organ and tissue donation when you authorize CRA to share your contact infromation with Ontario Health. Your authorization is valid only in the tax year that you file return. Your

information will only be collected under the Ontario Gift of Life Act.