



2023 Tax Checklist

- Get access to CRA My Account / provide Notice of Assessments and Reassessments received in the last year
- T4 slip(s) – including T4A, T4AP, T4OAS
- T3 slip(s)
- T5 slip(s)
- T5013 slip(s)

- Medical expenses: to ensure you have all receipts we highly recommend that you contact the following common sources of medical expenses and request a summary of your charges and payments for 2023:
 - Pharmacy
 - Health insurance company / group benefits plan
 - Dentist
 - If the summaries are not available please send the individual receipts

- Charitable donation receipts
- Moving expense receipts
- RRSP slip(s)
- Union dues' receipt(s)

- If you worked from home, a detailed expense worksheet including:
 - square footage: total and used for business
 - summary of household receipts
 - receipts for office equipment purchases

- Child care expense receipts
- Tuition receipt (T2202A)
- Gain/Loss summary
- Information for foreign investments
- Employment expenses (including T2200)

- Documentation for any real estate sale(s) including a primary residence

Summaries of:

- Rental income and expenses
- Business income and expenses
- Farming income and expenses

Other:
