



Street Address: #2033-1177 West Hastings Street
 City-Postal Code: Vancouver, B.C. V6E 3T4
 Phone Number: 250-785-2829
 Website: www.sterlingrealtygroup.com

PERSONAL TAX CHECKLIST

Source of Income

Employed

- Employment Income (T4)
- Employee Profit Sharing Plan Allocation (T4PS)

Rental Income

- Record of rental income and expense

Self - Employed

- Self-employed Service Fee or Commission
- Income from Construction Company

Property Disposition

- Primary home or investment property disposition

Property Detail (non-principal resident)

- Property Address _____
- Date Acquired _____
- Disposition Date _____
- Proceeds _____
- Cost _____
- Expense of Disposition _____

Property Detail (principal resident)

- Property Address _____
- Date Acquired _____
- Disposition Date _____
- Proceeds _____
- Cost _____
- Expense of Disposition _____



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Investment Income

- Interest and dividend (T5)
- Stock and other securities sales income (T5008)
- Trust income (T3)
- Statement of partnership income (T5013)

Retirement Income and Other Benefits

- Pension and old age security (T4A(P) & T4A (OAS))
- Social Assistant Payment and WCB (T5007)
- EI benefit (T4E)
- RRSP and RRIF income (T4RSP/T4RIF)
- Covid-19 related benefits (T4A)

Do you elect to split eligible pension income with your spouse?

- Yes
- No

Foreign Income

- Foreign employment income
- Foreign rental income
- Foreign investment income
- Foreign pension income

Deductions and Credits

Education Expenses

- Tuition tax receipts (T2202/TL11(A, C,D))
- Student loan interest

Medical Expenses

- Medical expense receipts
- Health insurance premium payment

Childcare Expenses

- Child care and day care expense
- Overnight camps (#of weeks attend and receipt) Camp

Donation

- Charitable donation receipts
- Political contribution receipts



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Moving Expense

Moving expense (request moving expense form from us)

Child and spouse support

Child, spouse support payment

Investment related expenses

Interest and carry charges on loan or credit borrow to do investment.

RRSP, PRPP and SPP contribution

- RRSP, PRPP and SPP contribution receipts
- Payment to home buyer's plan or a lifelong learning plan

Employment Expenses

- Declaration of Conditions of employment (T2200)
- Professional or Union Due Expenses

First home buyer

First time buying a home in 2022.

Canada training credit

Not eligible for the tuition tax credit

Disability tax credit

- Disability tax credit certificate
- Disability support expenses
- Home accessibility tax credit

Disability amount transferred from a dependent

- Home renovation tax credit (SK only)
- Renovation on principal residence in SK
- Between 2020.10.01 - 2022.12.31

Tuition amount transferred from a child or spouse.

Student signed the transfer section of their tax certificate.

COVID-19 INFORMATION

T4A -Canada Emergency Response Benefit (CERB), Canada Recovery Benefit, Canada Emergency Student Benefit, Canada Recovery Caregiving Benefit, Canada Recovery Sickness Benefit, Canada Worker Lockdown Benefit, or provincial or territorial COVID-19 financial assistance payments and/or repayments (provincial/territorial COVID-19 financial assistance payments will be on separate T4A slips)



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Yes

No

T4E- For CERB applicants who applied with Service Canada or who received any EI benefit payments (T4E(Q) slips for residents of Quebec)?

Yes

No

Amended T4A if the CRA adjusts your T4A amounts?

Yes

No

Payment summaries for repayment of COVID-19 benefits

Yes

No