

2023 INCOME TAX CHECKLIST

DON'T FORGET TO COMPLETE THE IDENTIFICATION QUESTIONNAIRE AND TO HAND IT IN WITH YOUR DOCUMENTS.

EMPLOYEE

- T4 employment slips or commission (T4, T4A, RL1)
- Employee in construction industry - CCQ (RL22)
- Union and professional dues
- Training costs
- Moving expenses for work (+40 km)
- Employment expenses:
 - Declaration of Conditions of Employment form signed by employer (T2200/TP-64.3)
 - Vehicle expenses [EXCEL ↓](#)
 - Home office expenses [EXCEL ↓](#)

FAMILY

- Child care expenses (RL24)
- Advance payments of tax credit for child care (RL19)
- Children's physical and artistic activities (QC 5 to 16 years – Max family income \$155,880)
- Adoption expenses / Infertility treatment expenses

RETIREE

- Old Age Security pension (T4AOS)
- CPP or QPP benefits (T4AP, RL2)
- RPP retirement benefits (T4A, RL2)
- RRSP and RRIF income (T4RSP, T4RIF, RL2)
- Home-support services for seniors (QC 70 years+)
- Advance payments of tax credit for home-support services for seniors (RL19)

INVESTMENTS

- Interest and dividends income (T3/RL16, T5/RL3)
- Sale of shares (T5008, RL18)
- Carrying charges and interest expense

OTHER

- RRSP or FHSA contributions
- Medical expenses summary [EXCEL ↓](#)
- Charitable donations/Political contributions [EXCEL ↓](#)
- Information about a leased dwelling - QC (RL31)
- Educator school supplies
- Support payment to ex-spouse
- 2022 Notice of Assessment (Federal and QC)

SELF-EMPLOYED

- Commission income or professional fees (T4A, RL1)
- Business income and expenses [EXCEL ↓](#)
- Professional dues
- Vehicle expenses [EXCEL ↓](#)
- Vehicle purchase/rental contract
- Business-use-of-home expenses [EXCEL ↓](#)
- CEBA loan repayment

POST-SECONDARY STUDENT

- RESP educational assistance payments (T4A, RL1)
- Scholarships (T4A, RL1)
- Post-secondary tuition fees (T2202, RL8)
- Interest paid on student loans

OTHER INCOME

- Employment insurance or QPIP (T4E, RL6)
- Wage-loss replacement plan benefits (T4A, RL1)
- Workers' compensation benefits (T5007, RL5)
- Social assistance payments (T5007)

RENTAL PROPERTY

- Rental income and expenses [EXCEL ↓](#)
- Purchase of real estate [EXCEL ↓](#)
- Sale of real estate [EXCEL ↓](#)

- Instalments paid for 2023 (Federal and QC)
- Sale of real estate (principal residence, cottage) [EXCEL ↓](#)
- Expenses to make your home safer and more accessible (65 years +, disabled, caregiver)
- Multigenerational home renovations
- Disability tax credit certificate (T2201, TP-752)
- Caregiver credit

WANT TO RECEIVE YOUR TAX REFUND FASTER?

Register for direct deposit with the CRA and RQ by providing us with a void check.

DEPOSIT OF DOCUMENTS

NEW

Please complete the personal identification questionnaire available on our website and return it to us with your documents.

PLEASE USE ONLY 1 METHOD TO SUBMIT YOUR DOCUMENTS

SECURE PORTAL



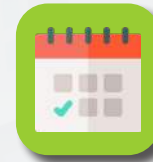
1. Complete the [personal identification questionnaire \(PDF\)](#) available on our website.
2. Use our [different forms](#) to compile your medical expenses, donations, business or rental property expenses.
3. Access your secure portal from the [Client access](#) button on our website.
4. Create a folder per family member under the section "DROP DOCUMENTS HERE".
5. Deposit your documents in a [single upload](#), once you have ALL your documents in hand.
6. It is **very important** to notify us by email at info@leclairduperre.com when your file is complete and ready to be processed.
7. We will contact you within the next 5 business days for a telephone interview.

SECURE EXTERIOR MAILBOX



1. Complete the [personal identification questionnaire \(PDF\)](#) available on our website.
2. Use our [different forms](#) to compile your medical expenses, donations, business or rental property expenses.
3. Insert your documents in an identified envelope (name and phone number). **Please keep your originals.**
4. Drop your envelope in our secure exterior box, available 24/7.
5. You can also deposit your documents at our office during opening hours.
6. We will contact you within the next 5 business days for a telephone interview.

IN PERSON APPOINTMENT



1. Make an appointment if you want an in-person client interview.
2. Complete the [personal identification questionnaire \(PDF\)](#) available on our website beforehand.
3. Use our [different forms](#) to compile your medical expenses, donations, business or rental property expenses.
4. Prepare your file in advance to maximize your meeting time.
5. Bring ALL your documents to the meeting. **Please keep your originals if possible.**

SEND US YOUR DOCUMENTS AS EARLY AS MARCH 4,
ONCE YOU HAVE ALL YOUR SLIPS IN HAND!