



2023 T1

Personal tax preparation form

Please complete this form and return it to us together with your financial information.

Number of tax returns to be prepared: _____

Personal information	Spouse information (if applicable)
Name: _____	_____
SIN: _____	_____
Date of birth: _____	_____
Phone #: _____	_____
E-mail: _____	_____
Address: _____	_____
City: _____	_____
Province: _____	_____
Postal code: _____	_____

Did you immigrate to Canada during the year: Yes No

Marital status (on Dec 31): Single Married Common-law Separated Divorced Widowed

Did your marital status change from last year's tax return? Yes No Date status changed: _____

Are we preparing a tax return for your spouse? Yes No N/A

If we are **NOT** preparing a tax return for your spouse, please provide: income figure from Line 23600 \$ _____

Please list all dependants below.

	Dependant 1	Dependant 2	Dependant 3	Dependant 4
Name:				
Relationship:				
Date of birth:				
SIN:				
Net income:				

1. Do you, your spouse or any of your dependants qualify for the Disability Tax Credit? Yes No
If yes, please indicate whom: _____
2. Did you, your spouse or any of your dependants dispose of a principal residence? Yes No
If yes, please indicate what year: _____
3. Do you, your spouse or any of your dependants want to register to receive e-mail notifications from CRA? Yes No
If yes, please confirm that email address: _____
4. Are you a Canadian citizen? Yes No
5. Do you authorize the CRA to provide information about you to Elections Canada? Yes No
6. Do you or your spouse own or hold foreign property (including shares) with a cost of more than CAN\$100,000? Yes No
7. Have there been any changes to your direct deposit details? Yes No
If yes, please include a void cheque with this form.
8. Did you work from home during the year? Yes No
If yes, please indicate how many days: _____
9. Did you pay rent or property tax during the year? Yes No
If yes, please indicate to whom and how much: _____
10. Do you have a rental property, sell your rental property, or have self-employment income? Yes No
11. Are you a first-time home buyer? Yes No

Other forms available on our website www.rougevalleyaccounting.ca:

- 2023 T1 Personal Tax Checklist
- 2023 T1 Real Estate Rental
- 2023 T1 Self-Employment Income & Expenses
- Underused Housing Tax (UHT) Quick Reference Chart

Please see our Personal Tax Checklist for a comprehensive list of forms and receipts to include with your income tax package.

ALL personal income tax packages should be emailed to: tax@rougevalleyaccounting.ca
or dropped off in our office mail slot: **345 Kingston Road, Suite 206**
Pickering, ON L1V 1A1

