



www.prosperitybusiness.ca

140-810 Central Avenue

Saskatoon, SK S7N 2G6

Tel: 306-934-6980

Fax: 306-934-6981

Email: info@prosperitybusiness.ca

PROSPERITY BUSINESS SOLUTIONS INC.

2023 T1 CLIENT QUESTIONNAIRE AND CHECKLIST

Please complete and return to us with your tax information.

Name: _____ Email: _____

SIN: _____ Marital Status: _____

Tel:(Cell Home Work)

Address:

Date of Birth:

For multiple family members, either complete separate checklists or provide their information below and ensure you indicate which family member(s) any comments relate to. Remember to please organize your documentation by family member.

Name: _____ Email: _____

SIN: _____ DOB: _____

Tel: (Cell Home Work)

Name: _____ Email: _____

SIN: _____ DOB: _____

Tel: (Cell Home Work)

Name: _____ Email: _____

SIN: _____ DOB: _____

Tel: (Cell Home Work)

*Ensure email addresses provided are secure, acceptable means of communication on tax matters.



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#	Information Requested	Yes	No	Details (where applicable)
1	Has your address changed? If so, please provide your new address.			
2	Did you dispose of a principal residence or vacation property in the year? If so, please provide us with the year of acquisition, the proceeds of disposition and indicate if it was jointly owned. If yes, did you (or do you) own another residence at any time during the period that you owned the residence that was sold?			
3	Did you buy a home in 2023? Provide details (e.g., are you a first-time home buyer? date of purchase?)			
4	Has your family profile changed in 2023? (ex: births, deaths, name change, change in marital status) (Provide details with relevant dates).			
5	Did you own any property or investments outside of Canada in 2023? (see footnote ¹)			

Other net income				
6	Please provide copies of all information slips with supporting pages attached. <i>Ensure to download slips for accounts where you've opted for paperless banking.</i> Common examples are:			
	T4	T4A(P) (Canada Pension Plan Payments)		T4RSP
	T4A	T4E (Employment Insurance Benefits)		Foreign Slips
	T3	T4(OAS) (Old Age Security Payments)		T4RIF
	T5	T5013 (Partnerships)		Any other slips
#	Information Requested	Yes	No	Details (where applicable)
7	Details of other income (including investment income and foreign pension income) for which no slips are available— please provide documentation			

¹ Did you own or hold “specified foreign property” at any time in 2023? Specified foreign property includes bank accounts held outside of Canada, debt and shares of foreign corporations (even if held in a Canadian brokerage account), interests in non-residents trusts, real estate located outside of Canada (except in certain situations) and other tangible and intangible properties located outside of Canada. Investments in RRSP accounts and TFSAs are excluded.



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#	Information Requested	Yes	No	Details (where applicable)
8	Provide the details of all investments sold during the year, including gain/loss reports and broker fee details provided by your investment broker or financial institution (typically available in the tax reporting package).			
9	Details of any cryptocurrency or non-fungible token holdings or activities (i.e., purchases, selling, trading, converting, airdrops, staking, and/or use of crypto to buy goods or services) including balances at the beginning and end of the year in \$CAD and quantity of crypto.			
10	Details regarding any spousal or child support payments received or paid.			
11	Details of rental income and expenses (for each rental property – attach separately).			
12	Details of self-employed business income and expenses (operated as a sole proprietor or in partnership) – attach separately. Also, details of any outstanding CEBA loans.			

Deductions				
#	Information Requested	Yes	No	Details (where applicable)
13	RRSP receipts (including RRSP contributions up to and including February 29, 2024).			
14	Receipts for professional or union dues paid.			
15	Child care expenses (attach receipts or T4 slips and summary).			
16	Details of moving expenses (to commence work at a new location or to earn taxable income while attending school where your new home is at least 40 km closer to the new place of work/school).			
17	Details of interest paid or carrying charges to earn investment income.			



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Deductions				
#	Information Requested	Yes	No	Details (where applicable)
18	For those with a T2200 signed by your employer, details of employment expenses.			
19	First Home Savings Account (FHSA) contribution receipts (for contributions made in 2023).			

Tax Credits				
#	Information requested	Yes	No	Details (where applicable)
20	Form T2202 or TL11 for post-secondary tuition (from university or college website or registrar's office). Other receipts for tuition fees (if not re-reported on Form T2202) such as exam fees.			
21	Receipts for interest paid on student loans (must be a federal or provincial student loan).			
22	Charitable donation receipts and political contribution receipts (please summarize).			
23	Unreimbursed medical receipts for amounts you paid for you, your spouse and dependent children under 18 years (including Medical Insurance premiums paid ²) (please summarize) <i>*Tip: Many pharmacies provide free summaries of prescriptions.</i>			
24	Provide the name and net income of any disabled dependant >18 years whom you help support.			
25	Support for any other tax credits (e.g., Digital News Subscription Tax Credit, Multigenerational Home Tax Credit, etc.).			
26	Support for provincial credits, if applicable.			

Please provide us with any additional information that is not covered by these questions.

² If you pay monthly health and/or dental premiums through your employer's private benefits plan please include the amounts of premiums paid.