

TAX SLIP CHECKLIST**T4 Statement of Remuneration Paid**

1. Backup of computerized accounting software for 2023 or manual payroll journal
2. Summary of Employee Deduction remittances made in 2023 (including payments made in January 2024 relating to 2023)
3. Details for all employees including the full name, social insurance number, date of birth and full address (if we prepared your T4 slips for you last year, you only need to provide information for new employees or changes to their information)
4. Form CPT30 for employees who are at least 65 years of age but under 70, who are receiving CPP retirement pension and have elected to stop making CPP contributions
5. Details on taxable benefits for each employee (see taxable benefit questionnaire: [Taxable Benefits](#))
 - Dental benefits, life insurance, health insurance, RRSP, housing, etc.
 - Details of business owned vehicles that are driven by the shareholder/employees for personal usage. Note that these also include service vehicles that are driven to/from work by employees.

T5 Statement of Investment Income

1. Details of interest and/or dividends paid for January 1 to December 31.

Annual Workplace Safety and Insurance Board (WSIB) Return

1. Annual return
2. Statements showing payments made for 2023

Annual Employer Health Tax (EHT) Return

1. Annual return
2. Statements showing payments made for 2023

By forwarding this information to us, you are acknowledging the following:

- That we will have access to personal information that is in your custody regarding your employees
- You represent to us that you are responsible for and have obtained any required consents for collection, use, disclosure and transfer to us of personal information required under applicable privacy legislation

We will hold all personal information in compliance with our Privacy Statement, a copy of which is available upon request.