

**2022 IDENTIFICATION FORM - MANDATORY**

Each year, the Canada Revenue Agency (CRA) requires verification of specific questions on your tax return. Your answers may change from year to year. Keeping us informed will help us keep our fees down!

**There is a NEW CRA QUESTION in 2022!** Therefore, each individual person filing a tax return must complete this form by answering YES or NO to the questions and providing the information requested.

Taxpayer Name: \_\_\_\_\_ (one form per person)

**Tax Return Delivery Option**

	YES	NO	Information
Do you want a paper copy of your tax return? <i>If no OR blank, an electronic copy will be provided</i>	<input type="checkbox"/>	<input type="checkbox"/>	Electronic copies are delivered by email or portal Extra fees may apply if a different option is requested later

**Identification and Contact Information**

	YES	NO	Information / Documents Required
Are you a new client? <i>If yes, provide identity details</i>	<input type="checkbox"/>	<input type="checkbox"/>	SIN Number: _____ Date of Birth: _____
Has your address changed? Are you a new client? <i>If yes, provide mailing address</i>	<input type="checkbox"/>	<input type="checkbox"/>	Mailing Address: _____ _____
Is the home address the same as the mailing?	<input type="checkbox"/>	<input type="checkbox"/>	_____
Did you sell your principal residence in 2022?	<input type="checkbox"/>	<input type="checkbox"/>	<i>If yes, provide sale documents for tax return</i>
Did you sell your principal residence in 2023?	<input type="checkbox"/>	<input type="checkbox"/>	<i>If yes, provide sale documents next year</i>
Have your phone numbers changed? Are you a new client? <i>If yes, provide preferred phone numbers</i>	<input type="checkbox"/>	<input type="checkbox"/>	Home Phone: _____ Mobile Phone: _____ Business Phone: _____
Has your email address changed? Are you a new client? <i>If yes, provide email for us to reach you</i>	<input type="checkbox"/>	<input type="checkbox"/>	Email address for Koroll & Company use (not for CRA): _____

**Canada Revenue Agency (CRA) Account and Mail**

	YES	NO	Explanation OR Information Required
Do you have a CRA "My Account" login? <i>If the login is not active, please select NO</i>	<input type="checkbox"/>	<input type="checkbox"/>	This means you have access to a secure log-in to your taxes or COVID supplements on the CRA website
Have you registered for CRA's online mail service? <i>If no, answer next question. If yes, skip to next</i>	<input type="checkbox"/>	<input type="checkbox"/>	This means you are currently receiving your CRA notices by email notification instead of by paper/mail
Do you want us to register your email address for CRA's online mail service? <i>If yes, provide email</i>	<input type="checkbox"/>	<input type="checkbox"/>	Email address for CRA online mail registration: _____
Do you need to update your email address with CRA's online mail? <i>If yes, provide new email</i>	<input type="checkbox"/>	<input type="checkbox"/>	Replacement email address for CRA online mail registration: _____
<i>If you have answered "NO" to the above questions, your CRA notices will be continue to be delivered by paper/mail.</i>			
Mail received from CRA in 2022 and 2023? <i>If yes, provide copies</i>	<input type="checkbox"/>	<input type="checkbox"/>	Assessments, Reassessments, Statements of Account, Instalment and other notices
Have you signed the authorization to EFILE form? <i>Complete Part E to match your answers above.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<b>MANDATORY</b> form for signature by ALL taxpayers: <a href="#">T183 Information Return - 2022 (fillable fields only)</a>

**Residence**

	YES	NO	Information Required
Was your province of residence different than mailing at December 31, 2022? <i>If yes, provide province and moving date</i>	<input type="checkbox"/>	<input type="checkbox"/>	Province of Residence: _____ Date of Move: _____
Did you immigrate or emigrate in 2022? <i>If yes, provide dates or entry OR departure</i>	<input type="checkbox"/>	<input type="checkbox"/>	Date of Entry: _____ Date of Departure: _____
Are you the resident or citizen of another country? <i>If yes, indicate country or residence OR citizenship</i>	<input type="checkbox"/>	<input type="checkbox"/>	Country of Residence: _____ Country of Citizenship: _____



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**Marital Status and Family**

	YES	NO	Information / Documents Required
Has your marital status changed? Are you a new client? <i>If yes, provide marital status</i>	<input type="checkbox"/>	<input type="checkbox"/>	Marital Status: _____ Date of Change: _____
Are we preparing your spouse's tax return? <i>If no, provide details from their tax return</i>	<input type="checkbox"/>	<input type="checkbox"/>	Spouse Name: _____ Spouse SIN: _____ Spouse Net Income (line 23600): _____
Are there changes to your dependants? Are you a new client? <i>If yes, provide list of dependants</i>	<input type="checkbox"/>	<input type="checkbox"/>	List names, dates-of-birth, SIN numbers and addresses For completeness use our form: <a href="#">List of Dependants</a>

**Canada Revenue Agency Questions - REQUIRED**

	YES	NO	Information / Documents Required
Do you have a Tax-Free Savings Account (TFSA)?	<input type="checkbox"/>	<input type="checkbox"/>	No details required
Are you a U.S. citizen?	<input type="checkbox"/>	<input type="checkbox"/>	No details required
Are you a Canadian citizen?	<input type="checkbox"/>	<input type="checkbox"/>	No details required
Do you authorize CRA to provide your information to Elections Canada?	<input type="checkbox"/>	<input type="checkbox"/>	This authorization is required each year For more information see <a href="#">Elections Canada</a>
<b>NEW - MUST ANSWER</b> Do you authorize CRA to provide your name/email address to Ontario to send you info about organ & tissue donation?	<input type="checkbox"/>	<input type="checkbox"/>	This authorization is for INFO ONLY from Ontario Health. It is NOT registering your consent to organ donation. For more details see: <a href="#">CRA Announcement Nov 21, 2022</a>
Did you own foreign property with a total cost of over CAN\$100,000 at any time in 2022? <i>If yes OR no, provide signed form</i>	<input type="checkbox"/>	<input type="checkbox"/>	<b>MANDATORY</b> form for signature by ALL taxpayers: <a href="#">Foreign Reporting Declaration</a>
Do you have direct deposit setup with CRA? If yes, do you want us to update your bank info? If no, do you want us to request direct deposit?	<input type="checkbox"/>	<input type="checkbox"/>	For online options see: <a href="#">Direct Deposit - CRA</a> Provide void cheque or form provided by bank Provide void cheque or form provided by bank

**New Clients – Signatures and Prior Years**

	YES	NO	Information / Documents Required
Have you completed an Authorization Request? <i>If no, sign, date and return to us</i>	<input type="checkbox"/>	<input type="checkbox"/>	Download the form here: <a href="#">Authorization Request</a> (complete all fillable fields)
Have you read and signed the Engagement Letter? <i>If no, sign, date and return to us</i>	<input type="checkbox"/>	<input type="checkbox"/>	Download the form here: <a href="#">Engagement Letter</a> (complete all fillable fields)
Have you provided information from prior year(s)? <i>If no, provide tax return copies from prior years</i>	<input type="checkbox"/>	<input type="checkbox"/>	Last three years preferred – minimum one year
Are there prior year issues needing investigation?	<input type="checkbox"/>	<input type="checkbox"/>	Let us know - provide details

**NEW FOR 2022**

**[ONTARIO SENIORS CARE AT HOME TAX CREDIT](#)**

All medical expenses are eligible – not just home care. Available to seniors age 70+ with family incomes under \$65,000. REFUNDABLE credit up to \$1,500 PER PERSON.  
 If you haven't claimed your medical expenses before, now is the time!

Both of these credits have been doubled in 2022!

**[FIRST-TIME HOME BUYERS TAX CREDIT \(HBTC\)](#)**

If you bought a home for the first time in five years (or if you are disabled), you can receive a credit of up to \$1,500 per household.

**[HOME ACCESSIBILITY TAX CREDIT \(HATC\)](#)**

If you are a senior or disabled (or live with someone who is), you can receive up to \$3,000 on home improvements related to accessibility to and in the home.

**[UNDERUSED HOUSING TAX \(UHT\)](#)**

This new tax is could require you to file a separate return.  
 The rules are complex – see our [Rental Property Worksheet](#) for more information.

Do you need help with gathering your documents? Use our [Personal Tax Checklist](#)

For secure document delivery:  
[Register for a Portal Login](#)  
[Login to your Portal](#)

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