



2024 PERSONAL INCOME TAX RETURN CHECKLIST

(For each item that applies, please provide applicable supporting documentation)

Information slips:

- | | | | |
|--|--------|--|--------|
| ☐ Employment income | T4 | ☐ Interest and Dividend Income | T5 |
| ☐ Pension, Retirement, Annuity & Other Inc. | T4A | ☐ Trust, Estate or Mutual Fund Income | T3 |
| ☐ Canada Pension Plan benefits | T4AP | ☐ Workers' Compensation benefits | T5007 |
| ☐ Old Age Security benefits | T4AOAS | ☐ Partnership income | T5013 |
| ☐ Employment insurance benefits | T4E | ☐ Securities transactions | T5008 |
| ☐ Fishing income | T4F | ☐ Tuition / Education amounts certificate | T2202A |
| ☐ RRIF Income | T4RIF | ☐ Other: _____ | |
| ☐ RRSP Income | T4RSP | ☐ Other: _____ | |

Other income:

- | | |
|--|---|
| ☐ Other Employment income or Taxable Benefits | ☐ Pensions (other than reported on T slip) |
| ☐ Business or Professional Income & Expenses | ☐ Interest earned but not received (bonds, term deposits, T-Bills, mutual funds) |
| ☐ Partnership Income | ☐ Capital Gains and Losses |
| ☐ Rental Income & Expenses | ☐ Other: _____ |
| ☐ Alimony and/or Child Support income | |

Other expenses:

- | | |
|--|---|
| ☐ RRSP Contributions (include receipts up to March 3, 2025) | ☐ Medical/Dental expenses including insurance premiums |
| ☐ Professional and/or union dues | ☐ First Home Savings Account Contributions |
| ☐ Childcare expenses | ☐ Interest paid on Canada Student Loans |
| ☐ Moving expenses (if moved >40 km for work) | ☐ Charitable donations (incl. those made up to Feb 28/25) |
| ☐ Alimony and/or Child Support payments | ☐ Political contributions |
| ☐ Interest on money borrowed to earn investment income | ☐ Costs related to Home Accessibility of a Disabled Person |
| ☐ Investment counsel/management fees (unregistered plans) | ☐ Physical activity expenses (\$2,000 max/family) |
| ☐ Employment expenses (please provide signed T2200 form) | ☐ Other: _____ |

Information relating to declarations or claims:

- ☐ Inform us of any changes in your personal information: home vs. mailing address, phone number, marital status, dependants, etc.
- ☐ Ensure we are aware of your Canadian Citizenship status and whether you would like to be included in the list of eligible voters.
- ☐ Ensure that we have the names, dates of birth, and social insurance numbers of all children under age 18.
- ☐ If one of your dependants was in full-time attendance at a university or college, please provide details concerning dependant's net income and tuition and education information (ie. Form T2202A). Please ensure form is signed by the student.
- ☐ Details of any capital gains and losses realized in 2024 including annual investment summary from broker.
- ☐ Inform us if you have sold any property, including your own residence, a rental or vacation property, during 2024.
- ☐ Details regarding RRSP Home Buyers' Plan or Lifelong Learning Plan withdrawals.
- ☐ Inform us if you have opened a First Home Savings Account (FHSA) during the year.
- ☐ If you purchased a home and did not own a home in the preceding four years, you may be eligible for the new first-time home buyer's credit. Please provide us with information to verify your home purchase.
- ☐ Details of foreign property owned at any time in 2024 including cash, stocks, trusts, partnerships, real estate, tangible and intangible property, contingent interests, convertible property, etc. Please provide details of income amount by country.
- ☐ Details of income from, or distributions to, foreign entities such as foreign affiliates and trusts.
- ☐ Inform us if you are a volunteer firefighter or a search and rescue volunteer.
- ☐ If you or any of your dependants are disabled, has a disability tax credit certificate been obtained?
- ☐ If you provided in-home care for a parent or grandparent (including in-laws) 65 years of age or over who is dependant on you because of a mental or physical infirmity, or an infirm dependant relative, please provide details of relative including, name, relationship to you, Social Insurance Number and net income.

Information received from Canada Revenue Agency:

- ☐ Receipts for or Summary of 2024 income tax instalments or payments of tax
- ☐ 2023 Assessment Notice and any other CRA correspondence