

# ESG Chartered Professional Accountants

## 2024 Personal Tax Return Checklist

Please use this checklist as a guide in preparing your documentation for the preparation of your personal tax return. It is important to prepare and file a complete tax return to avoid penalties later in the year.

### Personal Information

**\*Reminder to fill out Underused Housing Tax Form:  
if applicable must be filed by April 30/2025\* [UHT Info](#)**

Name	SIN	Date of Birth
Taxpayer		
Spouse		
Address	<b>** If needing assistance with the UHT Form, we can help for an additional fee, please notify by March 10/2025**</b>	
Email Taxpayer		
Email Spouse		
Taxpayer Mobile Phone Number		
Spouse Mobile Phone Number		
Home Phone		
Tax Return	<input type="checkbox"/> Email <input type="checkbox"/> Print	

Marital Status: ☐ Married ☐ Single ☐ Common-law ☐ Separated ☐ Divorced ☐ Widowed

If your marital status changed during the year, provide date of change: \_\_\_\_\_

If eligible, do you wish to split pension income with your spouse? ☐ Yes ☐ No

### Dependents

Name	Relationship	Date of birth	SIN	Disability?	Income

Did you receive or make support payments during the year? ☐ Yes ☐ No

### Residence

What was your Province or Territory of residence on December 31<sup>st</sup>, 2024? \_\_\_\_\_

Did you immigrate to Canada or emigrate from Canada during the year? ☐ Yes ☐ No

If yes, provide date of entry into Canada \_\_\_\_\_ or date of departure \_\_\_\_\_

## Elections Canada

Are you a Canadian citizen?

☐ Yes

☐ No

If yes, do you authorize the CRA to provide your name, address and date of birth to Elections Canada to update your information on the National Register of Electors?

☐ Yes

☐ No

## Foreign Reporting

Did you own or hold foreign property with a total cost of \$100,000 Canadian or more at any time during the year? If so, please provide details.

☐ Yes

☐ No

## Sale or Disposition of a Principal Residence or Other Real Property

Did you sell or dispose of your principal residence this year?

☐ Yes ☐ No

Did you sell or dispose of any other real property (cottage, vacation home, vacant land, etc.)?

☐ Yes ☐ No

Complete address of the property sold, including postal code (attach additional page, if required):

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**Note: \*\*Penalty for late filed of the Principal Residence is \$100 per month to max of \$8,000 & due same time as the return of the T1\*\***

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Year  
purchased:

Sold  
price:

Purchased  
Price:

## Foreign Pensions

Did you receive a pension from a country other than Canada?

☐ Yes ☐ No

If yes, provide the following details for each pension received (attach additional pages, if required)

Country: \_\_\_\_\_

Amount: \_\_\_\_\_

Exempt portion: \_\_\_\_\_

Currency: \_\_\_\_\_

Start  
date: \_\_\_\_\_

Foreign taxes  
paid: \_\_\_\_\_

## Tax on Split Income Requirement

Did you receive any of the following types of income from a private business, activity or profession where a related person who is resident in Canada has a significant interest or is actively involved:

1. Dividends or shareholder benefits from a private corporation ☐ Yes ☐ No

2. Partnership or Trust income from a related business ☐ Yes ☐ No

3. Rental income (including through a trust or partnership) where a related person is involved ☐ Yes ☐ No

4. Interest on loans to a private corporation, partnership or trust ☐ Yes ☐ No

5. Income or gains from the disposition of private shares or other property ☐ Yes ☐ No

## Income

T4 Slips – Employment income	<input type="checkbox"/> Yes <input type="checkbox"/> No
T4A Slips – Commission, self-employment, pension and scholarships	<input type="checkbox"/> Yes <input type="checkbox"/> No
T4AP Slips – Canada Pension Plan benefits	<input type="checkbox"/> Yes <input type="checkbox"/> No
T4A(OAS) Slip – Old Age Security	<input type="checkbox"/> Yes <input type="checkbox"/> No
T4E Slips – Employment insurance	<input type="checkbox"/> Yes <input type="checkbox"/> No
T4PS Slips – Profit Sharing Plans	<input type="checkbox"/> Yes <input type="checkbox"/> No
T4RSP Slips – RRSP income/withdrawals	<input type="checkbox"/> Yes <input type="checkbox"/> No
T4RIF Slips – RRIF income/withdrawals	<input type="checkbox"/> Yes <input type="checkbox"/> No
T5 Slips – Investment income	<input type="checkbox"/> Yes <input type="checkbox"/> No
T3 Slips – Income from trust allocations	<input type="checkbox"/> Yes <input type="checkbox"/> No
T5013 Slips – Partnership income	<input type="checkbox"/> Yes <input type="checkbox"/> No
T5008 Slips – Income from security transactions	<input type="checkbox"/> Yes <input type="checkbox"/> No
T5007 Slips – Social assistance and workers compensation	<input type="checkbox"/> Yes <input type="checkbox"/> No
Details on the sale of unregistered stocks, bonds, mutual funds, etc	<input type="checkbox"/> Yes <input type="checkbox"/> No
Foreign income	<input type="checkbox"/> Yes <input type="checkbox"/> No
Details of rental income and expenses	<input type="checkbox"/> Yes <input type="checkbox"/> No
Details of self-employed income and expenses	<input type="checkbox"/> Yes <input type="checkbox"/> No
Details on spousal support income or expense	<input type="checkbox"/> Yes <input type="checkbox"/> No
Any other income to report not reported on a slip	<input type="checkbox"/> Yes <input type="checkbox"/> No

## Deductions and Tax Credits

RRSP contributions	<input type="checkbox"/> Yes <input type="checkbox"/> No
Childcare expenses	<input type="checkbox"/> Yes <input type="checkbox"/> No
Union, professional or association dues (for which not reimbursed)	<input type="checkbox"/> Yes <input type="checkbox"/> No
Moving expenses	<input type="checkbox"/> Yes <input type="checkbox"/> No
Carrying charges (interest fees)	<input type="checkbox"/> Yes <input type="checkbox"/> No
Employment expenses (T2200 from employer required)	<input type="checkbox"/> Yes <input type="checkbox"/> No
Did you contribute to a first home savings account	<input type="checkbox"/> Yes <input type="checkbox"/> No
Northern resident deduction and travel expenses	<input type="checkbox"/> Yes <input type="checkbox"/> No
Caregiver credit	<input type="checkbox"/> Yes <input type="checkbox"/> No
Disability credit	<input type="checkbox"/> Yes <input type="checkbox"/> No
Interest paid on student loans	<input type="checkbox"/> Yes <input type="checkbox"/> No
T2202A Slips – Tuition paid	<input type="checkbox"/> Yes <input type="checkbox"/> No
Medical expenses for (RX's please get statement from pharmacy)	<input type="checkbox"/> Yes <input type="checkbox"/> No
Charitable donations	<input type="checkbox"/> Yes <input type="checkbox"/> No
Political contributions	<input type="checkbox"/> Yes <input type="checkbox"/> No
Provincial credits – property tax and/or rent	<input type="checkbox"/> Yes <input type="checkbox"/> No
First time home buyers tax credit	<input type="checkbox"/> Yes <input type="checkbox"/> No
Tax paid by installments	<input type="checkbox"/> Yes <input type="checkbox"/> No
Did you include your property tax statement?	<input type="checkbox"/> Yes <input type="checkbox"/> No