

# Personal Tax Checklist- 2024

## 1. Personal Information

- Full name
- Address/phone number
- E-Mail
- Social Insurance Number
- Date of birth
- Marital status as of December 31, 2024
- Dependents/Spouse(name, SIN and date of birth)

## 2. Income and Expense Information

- Employment income (T4)
- Employment insurance and other benefits (T4E)
- Pension, retirement, annuity, and other income (T4A)
- Old Age Security and Canada Pension Plan slips: T4 and T4A(OAS)
- Investment income (T3, T5, and T5008)
- Social assistance and worker's comp (T5007)
- RRSP and RIF income (T4RSP, T4RIF)
- Summary of rental income and expenses per property
- Summary of business income and expenses
- Employment expenses (T2200 is required)

## 3. Deductions and Credits

- RRSP contribution slips
- Charitable donation receipts
- Political donation receipts
- Medical expense summary
- Medical premiums paid to for health insurance plans
- Tuition and education expenses (T2202A or TL11 is required)
- Student loan interest
- Childcare expenses
- Children's fitness and art expenses (MB)
- Adoption expenses
- Professional or union dues (If not included on your T4)
- School supply expenses (teachers)
- Tool expenses (trade)
- Rent
- Property tax receipt
- Receipt for electronic subscription to Canadian newspapers
- Legal expenses to collect spousal support, pension or retiring allowance
- Home renovation/accessibility expense
- Investment advisor fees and interest expenses on **non-registered investments**



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## 4. Tax Documents

- Notice of Assessment from the previous year
- Correspondence from CRA
- Summary of instalment payments made for the tax year
- Copy of last year's tax return- NEW CLIENTS ONLY

## 5. Other Information

- Declare foreign property over \$100,000 including investments in foreign shares (excludes personal use properties)
- Sale of capital property- sale agreement and cost information including selling costs
- Did you sell your home/cottage?- Principal Residence Election (sale price, address, and year originally acquired)



***The above list is not all inclusive. Your accountant may require additional information depending on your situation. The above check list is only a general guideline to prepare your tax package for drop off.***