

T1 INFORMATION CHECKLIST 2024

NAME \_\_\_\_\_

SPOUSE \_\_\_\_\_

TELEPHONE \_\_\_\_\_

SIN \_\_\_\_\_

SPOUSE SIN \_\_\_\_\_

EMAIL \_\_\_\_\_

GENERAL

☐ Please provide entry or departure dates if you did not reside in Canada throughout 2024

☐ Did you move during 2024

☐ 2024 tax instalments paid (T7D)

☐ 2023 Notice of Assessment unless retained by our office

☐ Please provide details of change of marital status in 2024. Married? Divorced? Separated? (Y/N)

☐ Your 2023 personal tax return if we did not prepare it

☐ Your 1994 personal tax return if you made the capital gains election

☐ Did you purchase a qualifying home in 2024?

☐ Did you sell real estate in 2024?

☐ Will you need to file a Underused Housing Tax return?

☐ In 2024, were there any children born or adopted in your family?

DID YOU RECEIVE ANY OF THE FOLLOWING INCOME?

☐ Salary, wage or commissions (T4)

☐ Old Age security (T4A OAS)

☐ Foreign Income including Pensions

☐ Canada Pension (T4A P)

☐ EI Benefits (T4E)

☐ Other Pensions (T4A)

☐ Dividends (T5)

☐ Interest (T5/T600)

☐ Other investment income

☐ Estate or trust income (T3)

☐ RRSP income (T4RSP)

☐ RRIF income (T4RIF)

☐ Rental income, revenues and expenses, additions & disposals

☐ Partnership / tax shelter income (T5013/T101)

☐ Receipt of alimony/separation payments

☐ Apprenticeship completion grant

☐ FHSA withdrawals (First time home buyers)

☐ Other income

FOREIGN OR OFFSHORE TRUSTS

\* Did you loan or transfer property to an offshore foreign trust in 2024 or any other year?

\* Did you receive a distribution or loan from an offshore trust in 2024 or any prior year?

\* Do you have foreign property (excluding personal vacation property) with a total cost of more than \$100,000 CDN?

\* Do you have an interest in a foreign affiliate?

WERE YOU SELF EMPLOYED?

☐ Attach financial statements if not prepared by us

☐ Do you have a Business Number?

☐ Are you a GST registrant?

ALLOWABLE DEDUCTIONS/CREDITS (if applicable)

☐ Commission/employment expenses (must have signed T2200 by employer)

☐ Political donation receipts (BC and Federal)

☐ RRSP receipts - March-Dec 2024 plus 1st 60 days of 2025

☐ Did you contribute to an FHSA account (First time home buyers plan)

Did you open an FHSA account (First time home buyers plan)

☐ Charitable donation receipts

☐ Donations of publicly listed shares or investment products

☐ Medical Receipts - Please request detailed print out from Pharmacy

☐ Tuition receipts (T2202/T2202A) - for yourself or dependants

☐ Attendant care expenses

☐ Child care expenses (include name, SIN and address of person receiving income, or Daycare license number)

☐ Payment of alimony / separation allowance

☐ Moving expenses

☐ Accounting and legal fees

☐ Investment Counsel Fees (Non-Registered Accounts)

☐ Interest expense on investment loans

☐ Union dues receipts

☐ Professional membership fee receipts

☐ HOME OFFICE EXPENSE - must include T2200

DISPOSALS RESULTING IN CAPITAL GAINS OR LOSSES

☐ Applies to disposals of shares, real estate, bonds etc

☐ Provide the following for each disposal:

☐ Description of asset

☐ Purchase cost

☐ Selling price

☐ Selling costs

☐ V-Day Value (Dec 1971) if applicable

PERSONAL EXEMPTIONS

☐ Provide details of spouse's income (if applicable) unless we prepare the return

☐ Disability tax credit - do you qualify? (require Form T2201 if first year of claim)

**\*\*Direct Deposit: If direct deposit has not yet been set up with on your CRA account, please provide us with a void cheque. CRA is moving toward direct deposits as a requirement. You will have the ability to update any time during the year using CRA My Account as well.**

ELECTIONS CANADA (please circle)

\* Are you a Canadian Citizen? (YES/NO)

\* Do you authorize CRA to provide your name, address and date of birth to Elections Canada to update your information currently on the national Register of Electors? (YES/NO)

Are you a US Citizen? (YES/NO)

Did you sell your principal residence in 2024? (YES/NO)

Do you have dependants? If yes, provide Name, SIN, Relationship and DOB:

Did you have a change in use of any of your properties in 2024? (YES/NO)

Do you want a paper copy or electronic copy of your T1 Summary (additional processing fees may apply) ( PAPER / EMAIL )