

# 2024 Tax Checklist

Our Checklist is meticulously crafted to guide you through gathering all the required reporting information and documents for your **2024** tax return preparation. Should you need any assistance, feel free to reach out to our dedicated team at M.A. Consulting Corp

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**New Immigrant or First-Time Filer**

Complete "Taxpayer Identification Details"

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**Details on any changes to your family info** (Marital status, new dependents, change of address, etc.)

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**Prior Years tax returns or NOA** (if you are filling with us for the first-time)

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**T4** (Employment Income)

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**T4A** (Pension, annuity and similar income, OAS, CPP)

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**T4RIF** (Registered Retirement Income Fund receipts)

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**T4RSP** (Registered Retirement Savings Plan receipts)

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**T4E** (Employment Income benefits)

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**T4PS** (Statement of Employees Profit Sharing Plan Allocations and Payments)

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**T5** (Interest or taxable dividends)

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**T5008** (Dispositions of securities)

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**T101 and T102** (Resource expenses flow-through shares)

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**T3** (Statement of income from mutual funds, trusts, and income trust units)

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**T2200** (Declaration of conditions of employment signed by the employer)

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**T5013** (Statement of partnership income/loss)

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**Investments** (Non-registered accounts)

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**Provide a list of all investments** (e.g., stock, mutual funds) purchased and sold along with applicable details (e.g. sale price, cost, and outlays) and management fees paid. If applicable, please request this information along with a capital gain/loss trading summary from your broker/banker

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**Alimony or maintenance payment details**

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- ☐ **Personal tax credit claims for dependents** (e.g., caregiver, disability, eligible dependent, etc.)
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- ☐ **RRSP contribution receipts** (RRSP Home Buyers Plan details, Lifelong Learning Plan withdrawal receipts, etc.)
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- ☐ **FHSA contribution receipts**
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- ☐ **Charitable donation receipts**
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- ☐ **Union or professional dues**
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- ☐ **Interest expenses** (Amount paid and details of loans for business or investment purposes)
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- ☐ **T2202A** (Student tuition receipts, details of paid student loan interest)
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- ☐ **Medical receipts and Home Accessibility Tax Credit receipts** (Annual printout from pharmacy or insurance company)
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- ☐ **Political contribution receipts**
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- ☐ **Tax installment receipts/statement from Canada Revenue Agency**
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- ☐ **Prior years Notice of (re) Assessment from Canada Revenue Agency**
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- ☐ **Childcare expense receipts** (Details)
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- ☐ **Employment expense information** (Meals, home office, etc.)
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- ☐ **Self-employment information** (Including revenue, expenses and related GST information)  
Complete "Statement of Business & Professional Income Schedule"
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- ☐ **Summary of rental properties** (Receipts and expenses for each property)  
Complete "Rental Property Schedule"
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- ☐ **Details of personally-held foreign investments**  
If applicable, please request foreign investment summaries from your broker/banker
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- ☐ **Moving expenses and details**  
Complete "Moving Expense Deduction Schedule"
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- ☐ **Real estate acquisition and disposition details throughout the year** (Including your principal residence)
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- ☐ **Receipts to digital news subscriptions to qualified Canadian journalism organizations up to \$500**
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- ☐ **Direct Deposit Form or Void Cheque** (If your bank information change or filing first time)
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- ☐ **Rent or property tax amount, address, and payment made to** (If you live in Ontario or BC)
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