

2024 Tax Year With Tatlock Books and Tax



Your professional personal and small biz (sole proprietor, farm, and rental) virtual tax solution is ready to help you file the 2024 tax year.

We are a one-woman business, and Gwen is passionate about making sure your questions are answered, and that she has completed your taxes perfectly while ensuring that all the benefits and credits that apply to your situation are claimed.

How to work with us -

1. We provide you with a personal link to securely upload for your documents. Use last years link or ask for one at tatlockbooks@gmail.com

Our online link can be used on your phone or computer. PDFs, Excel spreadsheets, Word documents, and JPEGs are acceptable. If you don't have a scanner, most phones will scan documents or you can take a picture and upload that. Our secure server is Canadian based and complies with Canadian privacy laws.

2. You email us at tatlockbooks@gmail.com when everything is in the link so we know you are ready!
3. We email you a form to e-sign to allow us access to your myCRA account. This ensures Slips are not missing and we have information from previous years like RRSP limits, and any credits that can roll over
4. We complete your taxes; we will email you if anything appears to be missing or we have questions
5. We send you a form to e-sign to allow us to e-file on your behalf, and your invoice.
6. Once signed and paid, we file your taxes, and give you a full copy in the secure link
7. We aim for a turnaround time of under 2 weeks once we receive all your documents (the earlier you submit, the faster we are!)

Change this year – Please submit everything electronically if you can!

Gwen has an immune disorder that is extremely scent sensitive. Tax papers pick up scents like Febreze, plugs ins, and Scentsy. We don't want severe illness during tax seasons so everyone's taxes can be done promptly and accurately. All tax documents submitted by paper, not electronically, may not be completed until May

Gwen Thirlwall, Tatlock Books and Tax
5706 Tatlock Road, Clayton, ON, K0A 1P0
613-809-0660 tax season is busy, please email
tatlockbooks@gmail.com or leave a message

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Personal tax information required			
Legal Name (per CRA)		Preferred Name/ Used name	
Birthdate		SIN	
Mailing Address			
Marital Status (circle)	Single married common law separated divorced widowed c/l means living together for at least 12 months OR have a child together separated means separated for at least 90 days and living apart		
Did your marital status change in 2023, if so what was your previous status, and on which month			
E-mail address		Phone number	
Citizenship if other than Canadian Citizen	Did someone refer you? If so whom?		
Spouse, if applicable			
Legal Name		Preferred Name/ Used name	
Birthdate		SIN	
Email address (for e-signatures)			
Dependants, if any. Returning clients – please include any children born in 2024.			
Name	Date of Birth		

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Info we need checklist!	
Any and all income slips from employment, benefits, pension, and interest. T4, T4A, T4E etc. Anything that starts with a T! I will also download these from the CRA and cross reference so if you lost one, just let me know.	
Any other income including foreign income, foreign pensions, WSIB, and disability income	
Do you have any capital gains to declare not found on Tslips. Sale of a second home, land, or rental unit? Sale of standing timber? Sale of valuables?	
Do you have any self employment income? Small business, rental, MLM, side business, influence, farm? If so, please complete the self employment package as well.	
RRSP contribution receipts	
Union or professional dues receipts (ie annual licensing fees for your profession)	
Tuition receipts – Please make make sure I know of any transfer of tuition between and student and parent	
Receipts for interest paid on student loans	
Medical receipts. A summary of info for each person, for each type of payment is sufficient (ie prescriptions, eye care, dental) Ask your pharmacy for a printout!	
Charitable or political donations receipts. (MUST be a registered Canadian charity, Go Fund Me Donations are NOT deductible). Old unclaimed receipts from past 5 years can be claimed.	
Childcare receipts, including overnight and day camps	
Total amount of rent or property taxes paid (This is for the Trillium Benefit, generally received by households making 60 000 or less)	
Moving expenses if you moved 40km or more closer to a job, or for a new job(ask for details)	
Does anyone in the family receive the disability tax credit? If so, whom	
Is anyone in your home caring for another family member due to disability or impairment? If so, who is caring for whom?	

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Did you renovate to make your home more accessible for a senior (over 65) or someone with the Disability Tax Credit? Or to make your home a multigenerational home? If so, please provide receipts.	
Are you a volunteer firefighter or search and rescue personnel?	
Are you a teacher or ECE with expenses not covered by your employer? Please submit totals or receipts for supplies.	
Are you a tradesperson or apprentice? If yes, please include receipts or totals for tools. <i>Did you have to relocate for work overnight? You can claim travel, meals, and accommodation for temporary relocation to a worksite 150km or more from your home.</i>	
Have you made any tax prepayments? If so, how much?	
Do you own foreign property? What is the type, location, and value?	
Did you sell your home this tax year? If so, I need the purchase year and price, and the selling price, and selling costs. You DO NOT get taxed, but it must be declared!	
Did you purchase a home this year?	
Are you repaying a Home Buyers Plan? How much was repaid this year?	
Did you invest in a first home savings account?	
Did you work from home this year? Please provide your T2200 and see the forms below	
Do you have adoption expenses?	
Do you have legal expenses to gain income such as pension, child support, or spousal support?	
Do you have receipts for a Canadian digital news subscription	
Did you pay or receive child support? If so how much? PAID RECEIVED	
Did you pay or receive spousal support? If so how much? PAID RECEIVED	
Copy of Government Issued photo ID for new clients – required for adults filing (not children)	

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You, the client, are responsible to provide all information necessary to Tatlock Books and Tax for the purposes of completing your Income Taxes. This includes all world-wide gross income, and dispositions of capital property including the sale of personal residence. It also includes ensuring all deductions and expenses claimed with regards to a business, rental, farm, or employment are bona fide. You the client are responsible for keeping copies of all slips and returns should the CRA request them. You are aware that all returns may be subjected to a pre or post assessment review and/or audit and that Tatlock Bookkeeping is not liable for any results or amounts payable. You are aware that all fees payable to Tatlock Bookkeeping are due before the return is filed.

I have read and understood the above and will provide all necessary documentation for myself and my family. I am aware of the tax deadlines as indicated below.

Please have each adult sign and return

Signed _____

Date _____

Printed Name _____

Signed _____

Date _____

Printed Name _____

Taxes can be e-filed as of February 24 2025. The tax deadline is April 30 2025 for personal filing and paying any outstanding taxes. Self employed individuals must file by June 15 2025 (but still pay by April 30 to avoid penalties).

For your taxes to be filed on time I require all paperwork by April 15 2025 (May 15 2025 for self employed individuals)

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T2200

If you worked from home and wish to claim expenses I need a copy of the T2200 from your employer. You may only claim expenses declared on the T2200 – there may be some expenses not listed below you can claim, please forward me the info.

Square footage of home		
Square footage of area used for Business		
Times and days worked		
Utility Costs – heat, hydro, water, internet		
Rent Costs		
Reimbursable expenses costs (as detailed on T2200)		
Vehicle Costs		

Separation and Divorce

Taxes change when families change. If you provide your separation agreement it helps guide me on what we can, and cannot claim on your behalf.

1. You can claim legal fees to get spousal or child support (your lawyer can give you a receipt detailing that)
2. If you will be splitting the Child Tax Benefit a form, separate from your taxes, needs to be completed to initiate the change (ask me, we can do this!)
3. The eligible dependant benefit can only be claimed by parents who receive child support, either in full or in an equalized 50/50 custody situation
4. You can claim medical fees that you paid for your children
5. You can claim daycare/daycamp fees that you paid for your children while in your care or in a shared custody arrangement
6. Child support is not deductible or claimable
7. Spousal support is a deduction for the payer, and taxable income for the recipient if and only if it is in a written legal agreement
8. If you sold you interest in the family home, it is not taxable but must be declared.

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Pricing, all prices are before HST

Base Rates: Personal Taxes

- \$140 per person
- \$255 for a married or common law couple
- \$99 for retired seniors with pension income only, or student
- Tax follow up (audits, CRA requests for information – included up to 60 minutes)
- Changes to Canadian Child Benefit, \$100

Base rate includes:

T4/T4A/T4Es, dependants and child care benefits, medical expenses, charitable donations, climate relief, Ontario benefits application (Trillium), Home Buyers Plan, RRSP contributions, up to 25 slips/receipts per person, 15 minutes of support (phone/email/in person)

Additional costs for additional schedules/tax forms including, capital gains (starting at \$33) home use of office (\$33), personal use of work vehicles (\$33), Northern Residents Deductions (\$55).

Base Rates: Business Taxes

- \$330 business, farm, and rental property
- \$220 home based daycares and micro businesses
- \$115 taxes for your employed spouse
- HST filing \$115/period
- T – slips \$115/up to 4, \$15 each additional
- ROE - \$100/ea
- Bookkeeping \$75/hour

Base rate includes:

1 business, or 1 rental unit. 1 business use vehicle, business use of home deductions, COGS adjustment, and everything included in personal base rate. Additional costs for additional schedules and pages and bookkeeping that is not complete.

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Privacy Policy and Disclosure Authorization

Tatlock Bookkeeping respects the highly personal nature of the tax and bookkeeping information provided to us. The information will be used solely for the preparation of your books, tax return(s), CRA follow up/reviews/audits, or other purposes as directed by you. We will return to you all original slips, receipts and documents upon completion of your returns and payment for service rendered. We may keep electronic copies of certain documents to support your return in the event of a review or audit. All documentation will be stored securely and not share with other parties except as noted below. We will only disclose your personal information as legally required or as directed by you to the Canada Revenue Agency, Service Canada, other government agencies. We will share information with your accountant, your business partner, and your spouse or common law partner as may be necessary for the proper completion of your work and as directed by you. We will contact you related to the services we provide to you.