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TAX YEAR: PERSONAL INCOME TAX CHECKLIST 个人所得税清单(2024 version版本)

Name姓名: SIN工卡号: Date of birth 生日:
Spouse配偶: SIN工卡号: Date of birth 生日:
Marital status婚姻状况: PHONE电话 #: EMAIL:
Address(Canada)地址(加国):

If you are a new client of CQL & Partners, CPA, please sign the CRA authorization request form, which will be provided separately. Please note that E-signature is not acceptable. 您需授权我们作为您的代表会计师。如果您是新客户,请1号表格签名授权,不可使用电子签名] After we complete your tax returns, we will send a full set of your tax returns (Including T1- General) by encrypted email and ask you to sign on the Form T183 - Information Return for Electronic Filing. And then once we receive your signed Form T183, we will e-file your returns to the CRA 我们将通过加密邮件发送您的完整版的纳税申报表(包括T1- General),并要求您签名。签字确认后,我们才会申报给税局。也请您保留好本文件。

我们可能以微信方式和您联系吗? 若是,提供您家庭税务负责人的微信名 或微信号

GENERAL 基本信息

Dependents Name 18岁以下孩子, Date of Birth, Relationship, Net income 生日, 关系, 收入 Please provide details. 请提供明细。

NAME姓名: Relationship关系: Date of birth 生日: SIN工卡号:
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NAME姓名: Relationship关系: Date of birth 生日: SIN工卡号:

Y NO
是 不

请选择符合您的情况,并提供相关总结 Please select the situation that applies you and and provide related summary

- Are you a Citizen or Resident of the United States? 您是美国的公民/居民?
- Change in Marital Status or Name? 婚姻状况或姓名的变化? [If yes, please provide date and details] 如果是, 请提供日期及明细
- Are you a Canadian citizen? 您是加国公民吗?
- Do you authorize CRA to provide your information to Elections Canada? 您是否授权CRA向加选举提供您的信息?
- Did you dispose of real estate (incl. principal residence) or have a change in use of property in tax year? 您在报税年卖物业(包括住房)或物业改变用途(出租或自住) address地址; year of purchase购买年份; selling price卖出价格; Owner name % Ownership产权人及比例;
- Did you acquire a house in tax year? And Is it your first house for last 5 year? 您在报税年买了房子吗? 并且, 这是过去5年里的第一所房子吗?
- Rent or property tax paid for the year? 当年支付的租金或地税?
[Single Income < 50,000/Family < 65,000, Please provide rent / property tax receipt] [单身收入低于5万/家庭低于6.5万, 请提供房租收据/地税单第1页。若仅有合同, 无法提供收据, 请不要考虑申报。本项目高概率被税局查核]
- Did your employer requires you to work at home for at least 4 consecutive weeks during epidemic period? 您是否防疫期间或雇主主要求在家工作, 最少连续4周?
本疫情福利已过期, 您今年无法再申报这项在疫情期间居家办公最高\$500的福利。Please note that the Covid-19 benefits has expired. For the 2024 tax year, you won't able to claim of up to \$500 for the COVID-19 work-from-home expenses.
[If using simple method, please provide # of days work from home 若使用简易法, 请提供在家办公天数]
- Did you pay Tax Year Instalment? 您是否分期支付预付税款? [If yes, please provide details. 如果是, 请提供明细]
- Are you first year filing return? 第一年报税? [If yes, you must fill in the "Notes" question 如果是, 必须填写“注意事项”的问题]
date of you entry to Canada 进入加拿大长住日期
income from January 1 of that year to the date of you entry to Canada 当年1月1日到您进入加国期间的收入
- If spouse is a non-resident, or if NOT tax returns with our firm, please provide breakdown. 您配偶是非居民, 或您配偶没有在本事务所报税, 请提供配偶收入。

货币类型 line23600 净收入 \$

FOREIGN 海外资产

Foreign Property includes 海外资产包括:

Cash,Funds in foreign bank accounts 外国银行账户的现金,理财
Shares and Bonds of foreign companies 海外公司的股票,债券
Real estate situated outside Canada (except if owned exclusively for personal use) 加境外的房地产 [注:自用物业,持有期无需申报;出售年,申报增值]
Other(trademarks,patents,land use rights,gold bars,antiques,life insurance,trust..)其他(商标,专利,土地使用权,金条,古董,投资型保险,信托等)
Do you own all foreign properties with total cost > CDN \$100,000 but ≤ \$250,000?您是否拥有所有海外财产,总成本高于10万加元但低于25万?
Do you own foreign property with a cost greater than CDN \$250,000?您是否拥有成本高于250,000加元的海外财产?
[If yes,please provide details of foreign properties,monthly investment statements. 如果是,请提供外国房产的明细,投资报表]

(海外资产申报,请在我们的网站下载并填写“T1135 海外资产申报表-中文”)

INCOME 收入

Employment/ Commission 工资/佣金 (T4,T4A,T4PS,Foreign海外工资,Other)
[If you are planning to claim foreign tax credits ,please have Foreign Personal Income Tax Doc. 若您将抵扣海外已缴税,请提供海外纳税申报表]
Investment 投资 (T3, T5,T5013,T5008,利息及分红,Foreign海外投资-理财收益,Other)
Pension 退休金 Taxable Benefit 纳税福利 (T4E,T4A,T4RSP,T4RIF,T4AOAS老人金,T4AP,Foreign海外退休金,Other)
Disposition of Investments (eg.shares,bonds). 投资卖出增值/亏损(例如股票,债券)
[Please provide Realized Gains / Losses Summary from broker. 请提供有关金融机构增值/ 亏损报表]
Disposition of Investment property 卖投资房(即非免税自住房) Please contact us 请与我们联系
Rental Income 出租收入 Please fill in (Appendix C) 请填写(Appendix C)
Business Income 生意/自雇收入 Please fill in (Appendix A) 请填写(Appendix A)
(加拿大的税务居民需要申报海外收入[包括但不限于:工资,利息,理财,房屋出售,出租收入])
Is your foreign income is 0? 您的海外收入是0?
[If no ,please provide Foreign Personal Income Tax Doc or Income type&amount. 若您有海外收入,请提供海外纳税申报表或收入类别& 金额]

DEDUCTIONS 费用

Employment expenses 工作费用 Please provide expense summary (Appendix B) and a signed T2200? 请提供费用明细和签名的T2200
RRSP.RRSP供款 Please provide contribution slips.请提供单据
Home buyers plan – Repayment RRSP 购房者计划 - 还款 Please provide last year Notice of (RE)Assessment ;请提供上年NOA
Childcare Expenses托儿费 Please provide summary 请提供机构名称及金额
[If individual,please provide name and SIN # 若是私人,请提供名字及工卡号码注:若无法提供收据,请不要考虑申报.本项目高概率被税局查核]
Support Payments前配偶赡养费 Please provide summary 请提供金额
Union or professional dues (if not included on T4 already) 专业会费(如果尚未包含在T4中) Please provide summary 请提供金额
Investment Carrying Costs-Interest Expense投资成本-利息费用 Please provide summary 请提供金额
Investment Carrying Costs-Investment Management Fees 投资成本-管理费用 Please provide summary 请提供金额
Moving Expenses 搬家费 New home is at least 40 kilometers closer to a new job 为工作搬家,新的家距离新工作地点比旧家是否近40公里以上
[If yes,please provide a summary of moving expenses incurred. 若是,请提供所产生搬家费用的明细]

CREDITS 抵税

安省旅游抵税今年已被取消,无法申报
Please note the Ontario Staycation Tax Credit is not available in the tax year 2024.
Interest on eligible Student Loan 学生贷款的利息 Please provide summary 请提供金额
Tuition Fees or Dependent's Tuition Fees 学费/孩子学费 Please provide T2202 downlode from school website 请提供T2202,从学校网站下载
[If you are planning to transfer tuition credits from your child to yourself,please have the child sign T2202][若您将孩子的学费学分转移给自己,请让孩子签T2202]
Charitable Donations / Political Contributions 慈善捐款/政治捐款 Please provide summary 请提供总结日期,接收方名字,金额
Medical Expenses for self and dependents 自己和家属的医疗费用 Please provide summary,请提供总结日期,用户名字,用途,金额
Disability Tax Credit for self or dependents (DR.signed T2201 if first time of claim)自己或家属的残疾抵免(若第一次,请医生签署T2201)

Notes for first time filling tax 注意事项:针对第一年报税

You want the tax refund or benefits to be directly deposited into bank account,please provide void cheque/direct deposit form.,希望退税或福利直接存入您的账户,请提供void cheque/direct deposit form.
[We will charge additional fees for adding or changing.If CRA already has bank information,no need to inform again.添加或更改,我们会收取额外费用,若税局若已有银行信息,无需重复告知]

First time Climate action incentive +GST/HST credit 落地税: 碳税补贴 +GST/HST消费税 (针对第一年报税)
Climate action incentive 碳税补贴
Benefit limit: \$560 for single; \$1,120 for family of four.福利上限: 单身最高\$560; 四口家庭最高 \$1,120
GST/HST credit 消费税

