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# Personal Tax Return
# 2024
# T1 Checklist

***IMPORTANT NOTICE TO CLIENTS*: In order for us to prepare your returns accurately and on a timely basis, we need you to carefully fill in the information below. If you are unsure if your situation applies, please provide the relevant information and we will assist you.**

## Taxpayer Information (For ALL clients)

**NAME:**___________________________________________

How would you like your tax return delivered to you by our firm?

☐ Courier ☐ Pick Up ☐ Electronically (PDF) If so, provide email address:_________________________________

How would you like to receive your notice of assessment? ☐ paper ☐ electronically from the CRA

| Yes | No | |
|---|---|---|
| | | Did you own foreign assets at any time during the year with a total cost of more than $100,000? *(See "Foreign Property Memo" for what would be included)* |
| | | Did you dispose of any capital assets in the year? (E.g. shares, mutual funds, real estate property) If so, fill in "Capital Gains Worksheet". |
| | | Did you dispose of principal residence in the year? If so, please provide details (note starting in 2023 if principal residence is owned less than 365 days = taxable). |
| | | Are you a Canadian Citizen? |
| | | **If you answered YES to the above question-Do you authorize CRA to provide your name, address and date of birth to Elections Canada? |
| | | Are you a US Citizen (Green card holder)? |
| | | Do you reside in the US for part of the year? |
| | | Do you want to receive information about organ and tissue donation from the government? |

**RETURNING CLIENTS:** Please review the lines below VERY CAREFULLY to determine if ANY changes have occurred in the year. If unsure, fill in the information and we will determine if anything needs to be done.

## Taxpayer Information (cont'd)

**NEW CLIENTS: Please fill in completely -- RETURNING CLIENTS: Please fill any CELLS where there have been CHANGES**

☐ Mr. ☐ Mrs. ☐ Miss. ☐ Dr. ☐ Sir

| | | | |
|---|---|---|---|
| First Name: | | Cell: | |
| Last Name: | | Work Phone: | |
| Street Address: | | Fax: | |
| City, Province, Postal Code: | | Email: | |
| Social Insurance Number: | | | |
| Birthdate: | | Date of Death: | |

Date of departure from or entry to Canada, if within the year ______________

Marital Status:

☐ Single ☐ Married ☐ Separated ☐ Divorced ☐ Widowed ☐ Commonlaw

If marital status changed in the year, please indicate date of change: ______________

## SPOUSE (where applicable):

☐ Mr. ☐ Mrs. ☐ Miss. ☐ Dr. ☐ Sir

| | | | |
|---|---|---|---|
| First Name: | | Home Phone: | |
| Last Name: | | Work Phone: | |
| Street Address: | | Fax: | |
| City, Province, Postal Code: | | Email: | |
| Social Insurance Number: | | 2023 Net Income (if we don't prepare spouse return): | |
| Birthdate: | | | |

## CHILDREN/ DEPENDENTS:

| | | | |
|---|---|---|---|
| Name: | | | |
| Birthdate: | | | |
| SIN: | | | |
| Relationship: | | | |
| Tuition Fees: | | | |
| Net Income: | | | |

## TAX INFORMATION CHECKLIST (Checkmarks required) Please provide details or receipts on the following

### INCOME

- [ ] T4 - Salaries and Employment Income
- [ ] T4A – Pension, Retirement, Annuity and other income
- [ ] T4A (P) - Canada Pension Plan Benefits
- [ ] T4A(OAS) - Old Age Security Benefits
- [ ] T4RSP – RRSP Income
- [ ] T4RIF - RRIF Income
- [ ] T4E- Employment Insurance Benefits
- [ ] T5007 – WSIB, Social Services Benefits
- [ ] T5008 – Statement of Security Transactions
- [ ] Scholarships/Bursaries (T4A)
- [ ] Other Employment Benefits
- [ ] Spousal Support Payments Received (provide details)
- [ ] T5, T4PS – Interest/Dividends/Profit Sharing
- [ ] Interest on Tax Refund (s)
- [ ] T3 – Trust/Mutual Fund Income
- [ ] T5013 – Limited Partnership Income /(Loss)
- [ ] Foreign Income (e.g. foreign pensions, investment income) *
- [ ] Rental Income/Expenses (Full details required) *
- [ ] Gratuities and tips
- [ ] Self-Employed Income (Business, Professional, Commission) *

If you have self-employed income, provide details of income earned from website/webpages

- [ ] **Other**-Specify

| |
|---|
| |
| |
| |

- [ ] Details of any property sold in the year (real estate, non-registered investments, etc.) *

If you bought/sold any non-registered investments in the year provide trading summary/realized capital gains reports from your broker (review for accuracy).

### TAX CREDITS

- [ ] Spouse/Common-law Partner amount
- [ ] Eligible Dependent amount
- [ ] Disability tax credit (self/spouse/children) (include T2201 if first time claim)
- [ ] Home Buyers Tax Credit (for first time home buyers)
- [ ] T2202A tuition receipts
- [ ] For students, receipts for rent paid while living away
- [ ] Interest Paid on Student Loans
- [ ] Attendant Care Expenses/Nursing home
- [ ] Medical Receipts (non-reimbursed amounts only)

Obtain one statement from the pharmacist, dentist, chiropractor, etc. for payments made in the year and have separate statements for each family member.

- [ ] Political Contributions Receipts (Federal & Provincial)
- [ ] Caregiver Amounts
- [ ] Charitable Donation Receipts
- [ ] Adoption expenses
- [ ] Eligible educator school supplies (include receipts)
- [ ] Volunteer firefighter amount
- [ ] Search and rescue volunteer's amount
- [ ] Home accessibility expenses (federal)

For individuals eligible for the disabiltiy tax credit or seniors (65 and over).

- [ ] Multigenerational Home Renovation Tax Credit
- [ ] Senior's Public Transit Tax Credit (Ontario-age 65 and older)
- [ ] Digital News Subscription Expenses (provide receipt giving-subscription, QCJO designation number, amount paid, date paid)

**DEDUCTIONS**

- [ ] RRSP Contribution Receipts
- [ ] TL2 – Claim for Board and Lodging Expenses
- [ ] First-Time Homeowners Tax-Free Savings Account (FHSA) contribution receipts
- [ ] Union, Professional Dues
- [ ] Child Care Expenses (full details required)
- [ ] Spousal Support Paid (provide details)
- [ ] Moving Expenses (full details required)
- [ ] Disability Support Deduction (expenses paid so you could work/go to school)
- [ ] Allowable Business Investment Loss
- [ ] Carrying Charges/Investment Counsel and Accounting Fees (non-registered accounts)
- [ ] Capital Losses Carry Forward
- [ ] Employment Expenses (full details required) *
- [ ] Non-Capital Losses Carry Forward
- [ ] Deductible Legal Fees (eg.to collect salary or support)
- [ ] Employment Insurance Benefits Repayments
- [ ] T2200 – Declaration of Conditions of Employment
- [ ] Clergy Residence Deduction Form T1223
- [ ] Property taxes or rent paid on principal residence
- [ ] Home Office Expenses *
- [ ] Business Use of Vehicle *
- [ ] Labour Mobility deduction for tradesperson
- [ ]

**OTHER INFORMATION (where applicable)**

- [ ] Separation Agreement
- [ ] Details of any change of use of your principal residence in the year (to/from rental property)
- [ ] 2023 Notice of Assessment
- [ ] Copy of prior year tax return if first time client
- [ ] Summary of Installment Payments
- [ ] 2024 final property bill or rental receipts
- [ ] Details of sale of your principal residence (address, sale price, owners, year of acquisition)*
- [ ] Read T1 Foreign Property Memo for details *
  Have your brokers provide details of any foreign property held in your non-registered accounts (the total in multiple accounts could be more than $100,000, so you should get for all your non-registered accounts).
- [ ] Details US IRA/401(K)