

Checklist Regarding 2024 Personal Income Tax

Please submit your answers to the following questions:

- In 2024, were there any significant changes (address, email, telephone number, marital status, addition of a dependant, etc.).
- If you are a new client to our firm, please read our PDF document regarding the procedures for authorizing us to file information to the CRA as your professional representative.
- In 2024, did you dispose of a primary or a secondary residence?
YES NO

If, yes,

Year of purchase: _____ ; What was the selling price: _____ ;
What is the name(s) of the owner(s): _____

- In 2024, did you benefit from a prescription drug coverage through a private plan or the RAMQ?

Private plan: From _____ to _____ / RAMQ: From _____ to _____

- Have you received, held or disposed of (sold, ceded, exchanged, donated, etc.) any cryptoasset? _____ ***A penalty of up to \$2,500 can be given for failure to disclose information to the government.
- In 2024, did you own or hold foreign property whose cost amount exceeds 100,000 CAD? _____
- In 2024, did you open a FHSA account? _____ If yes, on what date? _____

The following is a list of documents needed depending on your situation:

In any case, it is important to provide us with:

- Last year's federal and provincial notices of assessment.
- The e-mail address of each person on file** (Sir, Madam, Children, ...)

Employee

- Employment income (T4 and RL-1 Slip)
- Union and professional dues
- Employment insurance benefits (T4E)
- RRSP contribution receipts
- FHSA contribution receipts
- Charitable donation receipts
- Summary statement from your insurance company for paid medical expenses AND/OR a summary statement from your pharmacy
- Receipts for other paid medical expenses (**massotherapy that is not covered**)
- Carrying charges slip (for non-registered investments)



- Paid instalments slip

Self-Employed

- Compilation of income and expenses
- Home office expenses
- Motor vehicle expenses used for business purposes
- RRSP contribution receipts
- FHSA contribution receipts
- Charitable donation receipts
- Summary statement from your insurance company for paid medical expenses AND/OR a summary statement from your pharmacy
- Receipts for other paid medical expenses (**massotherapy that is not covered**)
- Carrying charges slip (for non-registered investments)
- Paid instalments slip
- GST/QST returns, if applicable

With Dependent Children

(in a separation, please indicate who is designated as the provider for the dependent child)

- Childcare expenses (**RL-24 Slip, RL-30 Slip**)
- Advance payments of the tax credit for childcare expenses (**RL-19 Slip, if applicable**)
- Receipts for physical, cultural or artistic activities (for children between the age of 5 and 16 years)
- If applicable**, T4 and RL1 (employment income), email address and cell phone number

Owner of Rental Property

- Compilation of rental revenues
- Compilation of expenses

Student

- Tuition fees (**T2202A and RL-8 Slip**)
- Interest paid on student loan
- Scholarships (**T4A and RL-1 Slip**)
- RRSP contribution receipts
- FHSA contribution receipts
- Charitable donation receipts
- Summary statement from your insurance company for paid medical expenses AND/OR a summary statement from your pharmacy
- Receipts for other paid medical expenses (**massotherapy that is not covered**)



Retired

- Old Age Security Benefits (T4A(OAS))
- QPP retirement benefits (T4A(P), RL-2 Slip)
- Retirement and annuity income (T4A, RL-2 Slip)
- RRIF income (T4RIF, RL-2 Slip)
- RRSP income (T4RSP, RL-2 Slip)
- RRSP contribution receipts
- FHSA contribution receipts
- Charitable donation receipts
- Summary statement from your insurance company for paid medical expenses AND/OR a summary statement from your pharmacy
- Receipts for other paid medical expenses (**massotherapy that is not covered**)
- Carrying charges slip (for non-registered investments)
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Person 70 years of age and older

- Advance payments of the tax credit for home-support services (**RL-19 Slip, if applicable**)
- If in a senior's residence: Lease and schedule of the lease or provide cost of monthly rent and services provided
- If you live in a house or an apartment building: Home care or maintenance bills, monthly rent cost (if you live in an apartment building)

Other documents to include if applicable:

- Investment income (T3, RL-16 Slip, T5, RL-3 Slip)
- Statement of capital gains and losses realized and/or T5008
- Social assistance payments (T5007, RL-5 Slip)
- Workers' compensation benefits (T5007, RL-5 Slip)
- RL-31 Slip (if renter)
- Telework expenditure for 2024 (T2200, Declaration of Conditions of Employment), if only required by the employer

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