

PERSONAL INCOME TAX CHECKLIST - 2024

INCOME	DOCUMENTATION REQUIRED	# OF ITEMS	N/A
1. Salaries, wages commissions, fees, allowances	T4, T4A		
2. Pensions	T4A,T4AP,T4A(OAS),T4(RIF)		
3. EI Benefits	T4E		
4. Investments: Interest, Dividends, Foreign Income	T5,T4PS,T600, T3, T5008, T5013		
5. Capital Gains & Losses (Year End Reports)	Buy-Sell slips, T3, T4PS, T5		
6. Rental Income	T5013/Income & Expenses		
7. Alimony, child support or separation allowances	Amount		
8. Registered Retirement Savings Plan Income	T4RSP		
9. Other income (retiring allowances, scholarships etc.)	T4A, Listing of Income		
10. Income and Expenses from Self Employment	Listing or Financial Stmt., T5018		

DEDUCTIONS & CREDITS	DOCUMENTATION REQUIRED	# OF ITEMS	N/A
11. Allowable employment expenses (auto,travel etc.)	T2200 & Receipts		
12. RRSP contributions	Official Receipts		
13. Did you purchase a home in 2024	Purchase agreement		
14. Did you purchase a home using RRSP funds?	T4RSP		
15. FHSA contributions	FHSA receipt		
16. Union, professional dues	Official Receipts		
17. Tuition Fees	Official Receipts T2202A, TL11		
18. Child Care Expenses-name,address,SIN of payee	Receipts		
19. Investment carrying charges, loan interest for Investment Accounting Fees, Investment counsel fees.	Receipts		
20. Moving Expenses (job related move)	T1M/Receipts		
21. Alimony, child support paid	Amount/SIN & Name and address		
22. Tax Shelter investments	T101,T102,T5013		
22. Medical Expenses-for any 12 month period	Receipts		
23. Charitable Donations/Political Contributions	Receipts		
24. Other Deductions	Complete Details		
25. Tuition fees deducted Student or supporting parent	T2202, T2202A Tuition Receipt		
26. Ontario Property Tax Credit (Rent Paid & Taxes Pd)	Name of landlord, Municipality Amount		
27. Income Taxes paid in Instalments	Receipts		
28. Special Tax credits	Adoption Expenses, T2038(IND)		
29. Student Loan Interest	Receipts		
30. Adoption Expenses	Receipts		
31. Payments for IVF Treatments	Receipts		

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| 1. Did any of your dependants earn income during the year?
(Ignore if we are preparing a return for those dependants) | YES | NO |
| 2. Did you support any other dependants during the year?
(If non-resident, only spouse and children may be claimed) | YES | NO |
| 3. Were you or a dependant disabled during the year?
(Impairment must have lasted or be expected to last for more than 1 year) Complete Form T2201 and provide caregiver receipts. | YES | NO |
| 4. If you began to pay child support or renegotiated your child support payments in the tax year, please provide a copy of the agreement. | YES | NO |
| 5. Did your child (children) begin College or University in the tax year? | YES | NO |
| a) Did he or she live off residence, besides there home? | YES | NO |
| if yes, please provide a receipt that details, landlord, address and amount | | |
| 6. If you receive a refund, do you want Direct Deposit?
If yes, provide branch #, account # and institution # or Void cheque. | YES | NO |
| 7. Do want to authorize Canada Customs & Revenue Agency to provide Elections Canada with your name, address and birth date to allow Elections Canada to update the National Register of Elections. | YES | NO |
| 8. Do you authorize CRA to provide your email address to Ontario Health to send you information about organ and tissue donation (this is not registering you - just contact sharing between CRA and Ontario Health) | YES | NO |