



2024 Tax Checklist

Your information

Full Name _____

Address _____

DOB _____

(SIN) Phone number _____

Marital status Residency Status _____

Email address(es) _____

Family Information (if not provided in previous years)

Name / SIN / Birthdate / Relationship _____

Deliver completed tax returns by: Email (via ShareFile)
 Paper (extra charge of \$20 per return)

SLIPS AND RECEIPTS PROVIDED:

- | | |
|--|---|
| <input type="checkbox"/> T4, T5, T3, T4A, T4E | <input type="checkbox"/> Professional fees invoices (other than mine) |
| <input type="checkbox"/> T3 slips still to come - will be provided once received | <input type="checkbox"/> Investment counsel fees |
| <input type="checkbox"/> T4OAS, T4P (CPP) | <input type="checkbox"/> Tuition receipts (T2202A) |
| <input type="checkbox"/> T4RSP, T4RIF (RSP / RIF withdrawals) | <input type="checkbox"/> Medical / Dental and Disability expenses |
| <input type="checkbox"/> Partnership income (T5013) | <input type="checkbox"/> Child care (including name and S.I.N. of provider) |
| <input type="checkbox"/> RRSP contributions | <input type="checkbox"/> Alimony / Maintenance payments (if deductible) |
| <input type="checkbox"/> Union / Professional dues | <input type="checkbox"/> Moving expenses summary |
| <input type="checkbox"/> Charitable / Political donations receipts | |

CAPITAL GAINS/LOSSES:

Share dispositions in 2024

- "Capital Gain and Loss Report" from your broker
Without the above report, I will need the original
purchase price of any shares which were sold in 2024
- Selling expenses (i.e., broker's commission)

Other capital property disposed of in 2024

- A brief description of property
- Details of real estate sales and purchases
- Gross proceeds of sale and **date** of sale
- Original cost and date acquired

PROVIDE THE FOLLOWING WHERE APPLICABLE:

- | | |
|---|---|
| <input type="checkbox"/> Self-employed / Business summary | <input type="checkbox"/> 2024 installments paid \$ _____ |
| <input type="checkbox"/> Rental summary | <input type="checkbox"/> Foreign income and expenses and taxes paid |
| <input type="checkbox"/> Deductible employment expenses (Form T2200 required) | <input type="checkbox"/> RRSP Home Buyers Plan (T1036) |

MANDATORY QUESTIONS:

- Yes No Do you authorize your name, address, date of birth and email to be provided to Elections Canada?
- Yes No Did you own foreign property at any time in 2024, with a total cost of more than \$100,000 Cdn.? If yes, please provide details. (*This excludes personal use vacation properties*)
- Yes No Did you sell your principal residence in 2024?
- Yes No Did you open a First Home Saving Account, FHSA, in 2024?
- Yes No Did you own an interest in a foreign affiliate at any time in 2024?

Please don not forget to sign and submit 2024 engagement letter (from website)