

# Personal Tax Checklist

1. PERSONAL INFORMATION (*)				
First Name (as per SIN)	Last Name (as per SIN)	S.I.N	Date of Birth (yyyy/mm/dd)	
Address		City	Province	Postal Code
Phone	E-Mail	Are you a Canadian Citizen? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Marital Status		*If you are new to the country please note – some of the sections in the checklist might not be applicable to you, so feel free to leave them blank		
2. SPOUSE'S INFORMATION				
First Name	Last Name	S.I.N	DOB (yyyy/mm/dd)	Citizenship
If your spouse is a non-resident then please provide his/her taxable income of foreign country for calendar year: If your marital status changed during tax year, please provide the date it changed (yyyy/mm/dd):				
3. CHILDREN'S INFO				
Child 1 - First Name	Last Name	S.I.N	DOB (yyyy/mm/dd)	
Child 2 - First Name	Last Name	S.I.N	DOB (yyyy/mm/dd)	
4. SALE OF PRINCIPAL RESIDENCE				
Did you sell your principal residence during the year?			<input type="checkbox"/> Yes <input type="checkbox"/> No	
If YES: Year of Acquisition		Proceeds of Disposition		
Did you own any other properties that could qualify as a principal residence?			<input type="checkbox"/> Yes <input type="checkbox"/> No	
5. FOREIGN REPORTING (*)				
Do you own foreign assets with a cost greater than \$100,000 CAD?			<input type="checkbox"/> Yes <input type="checkbox"/> No	
6. INCOME SOURCES CHECKLIST (*)				
Employment (T4 or T4A)	<input type="checkbox"/>	RRSP, RRIF, RESP (T4RSP/T4RIF/T4A)	<input type="checkbox"/>	
Were you self-employed/contractor ? (please request Self-Employed checklist from us)	<input type="checkbox"/>	Government pensions (T4A[OAS]/T4A[PI])	<input type="checkbox"/>	
Did you work for Uber/Lyft/Instacart/Skip the Dishes/Doordash (please request Self-Employed checklist from us)	<input type="checkbox"/>	Interest/Dividends/Capital Gains (T3/T5/T5013)	<input type="checkbox"/>	
Employment Insurance (T4E)	<input type="checkbox"/>	Cryptocurrencies (Trading, Mining, Other)	<input type="checkbox"/>	
7. TAX DEDUCTIONS / CREDITS CHECKLIST (with official receipts) (*)				
Tuition Fees (T2202)	<input type="checkbox"/>	National Student Loan Interest (only if paid to Canadian Bank/Institution)	<input type="checkbox"/>	
RRSP Contribution	<input type="checkbox"/>	Medical Expenses (net of any reimbursements)	<input type="checkbox"/>	
Union/Professional Dues	<input type="checkbox"/>	Charitable or Political Donations (official receipts)	<input type="checkbox"/>	
Child Care Expenses (Incl. Name & SIN of Recipient)	<input type="checkbox"/>	First-Time Home Buyer?	<input type="checkbox"/>	
Moving Expenses (if at least 40km's closer to work)	<input type="checkbox"/>	Number of days worked from home due		
Government Subsidy benefits (ie. CERB / CRB) repaid				

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## 8. OTHER IMPORTANT DOCUMENTS CHECKLIST

Mutual Fund Investment Summary Statement	<input type="checkbox"/>	T2200 Employer Authorization for Expenses (or T2200s if worked from home due )	<input type="checkbox"/>
Sale of Property: Address, Cost of property	<input type="checkbox"/>		
Sale of Property: Seller's Statement of Adjustments	<input type="checkbox"/>	New Clients: T1 Tax Return Filed for Prior Year	<input type="checkbox"/>
Sale of Shares: Gain/Loss Summary from Broker	<input type="checkbox"/>		<input type="checkbox"/>
New Clients: Notice of Assessment for Prior Year	<input type="checkbox"/>		

## 9. ADDITIONAL INFORMATION IF YOU IMMIGRATED TO CANADA IN 2024

Date of entry to Canada	(yyyy/mm/dd)		
Income earned in Foreign Country before coming to Canada for last 3 years	CAD	FOREIGN	FOREIGN COUNTRY NAME
2024 Income from Foreign Country (Jan 01 till date you landed to Canada)			
2023 Income from Foreign Country (Jan 01 to Dec 31, 2023)			
2022 Income from Foreign Country (Jan 01 to Dec 31, 2022)			

## 10. RENT INFORMATION (Only if paid in Ontario)

Mailing Addresses lived in 2024 and rent paid at each address		
Mailing Address	No. of Months Lived	Monthly Rent Paid
Address 1		
Address 2		
Address 3		

## 11. DIRECT DEPOSIT/ TAX REFUND (\*)

Has Your Direct Deposit Information Already Been Provided to CRA?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If NO: Would Like to Have Tax Refunds Directly Deposited, provide us the below otherwise CRA will mail your refund via Check:	
Branch Number (5 digits)	
Institution Number (3 digits)	
Account Number (Maximum 12 digits)	<input type="text"/>

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