

All Taxpayers Checklist

2024 Tax Year

The following checklist is a reference to help you in gathering items needed to prepare your 2024 personal income tax return.

- ☐ A copy of your last year's Notice of Assessment, if readily available
- ☐ Tax Instalment Notice from the Canada Revenue Agency confirming total paid for the 2024 tax year
- ☐ 2024 Property Tax Statement and receipts and/or rental receipts for your dwelling
- ☐ Income slips, as listed, on your Client Information sheet (ie. T3, T4, T5, etc.) Note any changes, deletions or additions of slips, on this form.
- ☐ Year-end investment packages (this will provide us with gains/losses and management fee reporting)
- ☐ Other pertinent income slips – T5007 (social assistance or WCB)
- ☐ Medical expenses - Refer to our website for a medical expense form to complete and return with your receipts
- ☐ Official charitable donation and childcare receipts
- ☐ Official receipts for union dues, professional dues, T2202 (tuition) slip, student loan interest and RRSPs
- ☐ Consumable supplies invoices (for Teachers and Early Childhood Educators)
- ☐ Travel expenses for tradespeople in the construction industry who travel for work.
- ☐ Details on changes in dependents and earnings of dependents
- ☐ Changes in mailing address, contact information (telephone and email), name changes, marital status changes and if a baby has been born in 2024 (include name, gender, and date of birth).

Important Notes:

1. Registered Retirement Savings Plan contributions must be made by March 3, 2025 to be eligible for a deduction on your 2024 personal tax return. If you need tax planning advice regarding RRSPs, please have your books to us by February 10 and clearly indicate that you require RRSP advice.
2. Do not separate any income slips – all slips will be returned to you.
3. Referring to your prior year's income tax return can assist you with knowing what was claimed previously and what slips/documents to bring in this year.