

# INVISION CHARTERED PROFESSIONAL ACCOUNTANTS

## 2024 GENERAL PERSONAL TAX RETURN CHECKLIST

Please complete the following.

Name: \_\_\_\_\_ Birth Date: \_\_\_\_\_ Marital Status: \_\_\_\_\_

Name: \_\_\_\_\_ Birth Date: \_\_\_\_\_

Address: \_\_\_\_\_

Phone #: \_\_\_\_\_

Please advise of any changes in the status of dependants throughout 2024.

If you would like us to email your tax return and invoice to you (instead of mail), please provide your email address(es): \_\_\_\_\_

### PLEASE CHECK APPLICABLE ITEMS AND ATTACH SUPPORTING DOCUMENTATION

Visit our website: [www.invisioncpa.com](http://www.invisioncpa.com) for additional worksheets

- \_\_\_\_\_ Did you make any tax installments for 2024? (\$ \_\_\_\_\_) (\$ \_\_\_\_\_)
- \_\_\_\_\_ Please indicate if you will be away in March/April (NO/YES - Dates: \_\_\_\_\_)
- \_\_\_\_\_ Did you change banks? If yes, please provide a void cheque so we can update direct deposit info.

*Principal Residence (Please provide applicable description of property, year of acquisition, and proceeds of disposition)*

- \_\_\_\_\_ Did you purchase or sell your home or vacation property? (includes property outside of Canada)
- \_\_\_\_\_ Did you begin renting out a portion or all of your home or vacation property?
- \_\_\_\_\_ Did you convert a rental property into your principal residence?

*Income (Please provide all information slips)*

- \_\_\_\_\_ T4 - Employment income
- \_\_\_\_\_ T3 - Trust income
- \_\_\_\_\_ T5 - Interest and dividends
- \_\_\_\_\_ T5013 - Partnership income
- \_\_\_\_\_ T4A(OAS) - Old age security
- \_\_\_\_\_ T4A(P) - Canada Pension Plan
- \_\_\_\_\_ T4A - Pensions and other income (**indicate if patronage income is from personal consumption**)
- \_\_\_\_\_ T4E - Employment insurance
- \_\_\_\_\_ T4RSP - RRSP withdrawals
- \_\_\_\_\_ T4RIF - RRIF payments
- \_\_\_\_\_ All other tax slips not mentioned above
- \_\_\_\_\_ Business income - (Complete business worksheets or provide a statement of income and expenses)
- \_\_\_\_\_ Farm income - (Complete farm worksheets)
- \_\_\_\_\_ Rental property - (Complete rental worksheet)
- \_\_\_\_\_ Spousal support payments received during 2024 (\$ \_\_\_\_\_)
- \_\_\_\_\_ Scholarships, bursaries or grants (\$ \_\_\_\_\_)
- \_\_\_\_\_ Other sources of income, not reported on a T-slip or included above (\$ \_\_\_\_\_)
- \_\_\_\_\_ Purchases or sales of investments, including cryptocurrency transactions (excluding RRSP and TFSA). Please provide your trading summary from your investment statements for sales detail and original cost information

*Deductions (Please provide all applicable receipts)*

- RRSP purchases and contributions (including purchases and contributions Jan 1, 2025 - Mar. 3, 2025)
- RRSP withdrawal for the Home Buyer's Plan or Lifelong Learning Plan
- Investment expenses (e.g. interest or management fees)
- Union, professional or like dues
- Child care expenses (Provide social insurance number for individuals paid to)
- Moving expenses (if move is greater than 40 Kms for work)
- Spousal support payments paid during 2024 (\$\_\_\_\_\_)
- Employment expenses incurred for which you are not reimbursed
- Northern Residents travel - complete attached travel worksheet. (Available to all residents in Northern Zones)

*Non - Refundable Tax Credits (Please provide all applicable receipts)*

- Tuition receipts (T2202), exam fees and other training/course fees
- Interest paid on student loans in 2024 (carry forward up to 5 years)
- Medical expenses (complete attached worksheets)
- Donations or Political contributions

*Foreign Property (Please circle the appropriate answer)*

- Did you own foreign property greater than \$100,000? (T1135)
- Do you have any dealings with non-resident trusts or corporations? (T1141/T1142)