

PERSONAL INCOME TAX
CHECKLIST



CHARTERED PROFESSIONAL ACCOUNTANTS

Returning Client

Personal Information

Tax Year:	2024			PDF Copy?	PAPER Copy?
Legal Full Name:				No Fee	\$7.50 Fee
Spouse Name:				No Fee	\$7.50 Fee
Marital Status:				If changed, date of marital status change:	
Address:					
City:		Province:		Postal Code:	
Email Address	<small>(One email address per person for DIGITAL signing)</small>				
Telephone:	Cell:		Other:		
Yes	No	Has your mailing address/telephone/email changed since the last tax return?			
Yes	No	Did you sell property or properties which you are claiming principal residence since your last tax return?			
Yes	No	Did you sell any assets subject to Capital Gains? (Documents required)			
Yes	No	Do you own more property besides your principal residence (if own)?			
Yes	No	Are you on Joint title to any property (other than your principal residence)			
Yes	No	Are you on title to any property for financing purposes/is anyone on yours?			
Yes	No	Do you rent your home? (May qualify for BC Renters Credit)			

Dependents: (If space is insufficient, please use additional space on reverse)

Name:	Relationship	Gender	SIN	Date of Birth	Net Income

Yes No Do any of your dependents have physical or mental impairment?

Required CRA Information

Client		Spouse		
Yes	No	Yes	No	Do you authorize the release of your information to Elections Canada?
Yes	No	Yes	No	Are you a Canadian citizen?
Yes	No	Yes	No	Do you hold citizenship in any other country? If so, which one? _____
Yes	No	Yes	No	Did you hold foreign property with a total cost exceeding \$100,000(Canadian)?
Yes	No	Yes	No	Did you hold any shares or an interest in non-resident corporations or trusts?
Yes	No	Yes	No	Did anyone outside Canada owe you money?
Initials		Initials		

↪ See reverse

Self / Spouse	Required Tax Information
	If applicable, are you interested in Pension splitting? YES or NO (circle one)
	Do you or your spouse claim disability tax credit? Is 2024 your first year claiming?
	Are you a Volunteer Firefighter or Search & Rescue Volunteer?
	Did you buy your first home in 2024? Home buyers' credit may apply.
	Do you have rental property earnings? Or Self Employment Earnings?
	Self Employment / Rental Income – See Checklist for reminders

Please include all information for your personal income tax return for the year.

- T4, T4A, T4RIF, CPP, OAS, T3, T5
- T2202A Tuition (Self; spouse; dependents)
- T777 Employment Expenses
- RRSP Contributions
- Investment gains & losses
- Rental property (income/expense summary & details)
- Foreign Income (slips or income summary)
- Original Purchase documents for real estate transactions
- Childcare expense (full details)
- National Student Loan interest paid
- Moving expenses (full details and invoices)
- Charitable donations
- Political donations
- Medical receipts
- Sale Documents for Real Estate Transactions
- Alimony payments

If you have any significant changes from your prior year's personal income tax return, please provide details.

Please provide more information regarding additional owned properties if applicable:
