

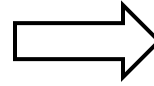
Eva Srulovicz-Kovac, Chartered Professional Accountant  
2024 TAX CHECKLIST

**Name and Address:**

Please indicate any change  
in your name and address  
if applicable:

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

**E-mail:** \_\_\_\_\_



**1. INCOME**

- ☐ T4 All employment income.
- ☐ T4E Slip Employment Insurance benefits.
- ☐ T4A Slip Pension, Annuity, Old Age Security (OAS), Retiring allowances, CPP, scholarships, etc.
- ☐ T5, T600 & T3 Dividend, interest, bond and trust income (including mutual funds).
- ☐ T4 RSP/RRIF All Registered Retirement Savings Plan (RRSP), and Registered Retirement Income Fund (RRIF) Income.
- ☐ Other Interest Details of mortgage, loan, G.I.C., T-bill, or other income not appearing on T5 slips. Note that if you have investment instruments upon which interest is accruing but not payable at least annually, you should provide us with the details.
- ☐ Capital Gains & Losses Copies of brokerage statements and **trading** summaries, details of sales of other capital properties (e.g. real estate dispositions, mutual funds, etc.).
- ☐ Rental Income Details of rental income and expenses, and where properties have been bought and sold: details of closing (proceeds on disposition, selling costs, original costs, etc.)  
**For each rental property indicate the complete address, including postal code.**  
**If you have sold your principal residence, please provide the following information: the year of acquisition, address of the property and proceeds of disposition. Please notify of any change in use.**
- ☐ Sale of Principal Residence/Change in Use Details of self-employed income and related expenses & deductions; details of any business-related asset purchases – please indicate date of purchase for computers, furniture and equipment, provide invoices/lease agreements for automobiles. Please complete attached self-employed checklist.
- ☐ Self-Employed Income Details of foreign assets held and income earned including currency and **taxes withheld (provide proof).**
- ☐ Foreign Income Management fees, bonuses, alimony, support (if first year of separation include the agreement).
- ☐ Other Income

**2. DEDUCTIONS**

- ☐ Employment Details of claims for eligible employment expenses, **including** Form T2200 completed and signed by employer (temporary flat method no longer applies).
- ☐ Carrying Charges Details of all interest expenses and charges applicable to the earning of income, investment management fees.
- ☐ Receipted Deductions RRSP contributions (including details of any transfer and/or rollovers), union & professional dues.
- ☐ Other Deductions Details of maintenance or alimony payments (if first year of separation, provide agreement), receipts for child care expenses.
- ☐ Tax Advantaged Investments Provide copies of all tax shelter financial statements, T5013 slips, loans, etc.

**3. TAX CREDIT CLAIMS**

- ☐ Tuition Fees Provide receipts T2202 (self or supporting person) for qualifying fees paid in the year.
- ☐ Medical/Dental Provide receipts – for maximum advantage, note that the period covered can be **any 12-month period ending in the calendar year.**
- ☐ Charitable/Political Provide receipts.
- ☐ Rent/Property Taxes Provide details of rent/property taxes paid in the year (**only if you are in the lowest tax bracket**) and include the name and address of landlord/municipality paid.
- ☐ Disability Provide details where claim for disability (self or dependent) exists (Form T2201).
- ☐ Home Buyer's amount First time home buyers only. Provide acquisition date of the property purchased
- ☐ Home Accessibility Tax Credit Receipts - see eligibility in the accompanying client letter.
- ☐ Digital News Provide receipt(s). Only the individual(s) who entered into the agreement for the subscription can claim the expenses. This only applies for subscriptions with a qualified Canadian journalism org.
- ☐ Subscription Expenses Please provide receipt(s).
- ☐ Multigenerational Home Renovation Tax Credit

**4. GENERAL**

- ☐ Personal Information Provide details of any change of marital status, including date, new dependents – date of birth.
- ☐ Tax Instalments Provide details of all instalments made in the year – **new clients only.**
- ☐ Assessment Notice Please provide us with a complete copy of your T1 Notice of Assessment for last year (all pages) and Notices of Reassessment for prior years, if any. **New clients only.**

**COMMENTS / CONCERNS / QUESTIONS**

Detail any comments or questions you have related to the preparation of your return on a separate sheet.