



**PERSONAL INCOME TAX
CHECKLIST FOR CANADIAN
INDIVIDUAL TAX RETURNS
2024 TAXATION YEAR**

DUE DATES FOR 2024 CANADIAN INCOME TAX RETURNS

CANADIAN INCOME TAX RETURNS	DEADLINE
Deadline for filing your personal income tax return	April, 30, 2025
Deadline for paying balance due to avoid interest (same for self-employed individuals)	April, 30, 2025
Deadline for filing a return if you or your spouse are self-employed	June 16, 2025
Deadline for filing T1135 Foreign Income Verification Statement	April 30, 2025; or June 16, 2025, depending on your filing deadline

PROCESSING INFORMATION

Please indicate your preferred form and delivery method for your 2024 personal tax package:

1. Electronic copy: YES NO
 - a. Delivery method: email or iFirm Portal.
2. Hard copy: YES NO
 - a. Delivery method: registered mail to home address or pickup.
3. If you would like **both** forms of your 2024 tax package please indicate.
 - a. I would a hard copy and electronic copy of my tax package: YES NO

Consent to share contact information – Organ and tissue donor registry:

1. I authorize the CRA to provide my name and email address to Ontario Health so that Ontario Health (Trillium Gift of Life) may contact or send information to me by email about organ and tissue donation*. YES NO

Canada Carbon Rebate (formerly known as Climate action incentive payment):

1. Did you reside outside of the [census metropolitan areas \(CMA\)](#) of Barrie, Belleville-Quinte West, Brantford, Greater Sudbury, Guelph, Hamilton, Kingston, Kitchener- Cambridge-Waterloo, London, Oshawa, the Ontario part of Ottawa-Gatineau, Peterborough, St. Catharines-Niagara, Thunder Bay, Toronto or Windsor, as determined by Statistics Canada (2016), and expect to continue to reside outside the same CMA on April 1, 2025. YES NO

*Please note you are not consenting to organ and tissue donation when you authorize the CRA to share your contact information with Ontario Health. Your authorization is only valid for the tax year for which you are filing this tax return. Your information will only be collected under the Ontario Gift of Life Act.

IDENTIFICATION: TAXPAYER INFORMATION**REQUIRED INFORMATION**

Please fill out the personal information on the following pages where items are applicable to you. Sections not applicable to you can be disregarded, if so, please indicate (N/A).

A. Personal information

1. Name (First, Last): _____
2. Current mailing address: _____
3. Email address: _____
4. Telephone number (preferred): _____ Secondary: _____
5. Date of Birth (MM/DD/YYYY):
6. Employed: Self-Employed:
 - a. If you are self-employed, please indicate the type of work and industry: _____
 - b. Name of present employer: _____
7. Social Insurance Number (SIN#): _____
8. Were you born in the U.S. or are you a U.S. citizen?: Yes No
 - a. If you answered yes to #10, please attach a copy of your finalized 2024 U.S. Federal and/or state tax return. If you have received your notice of assessment for your 2024 U.S. return, please attach this documentation as well.
9. Please attach a copy of your and your family's 2023 Notice of Assessment(s) issued by the CRA and any reassessments received during the year.
10. Marital status at December 31, 2024:
 ___ Married ___ Widowed ___ Divorced ___ Separated ___ Single ___ Living common-law
11. Date of change in marital status:
12. Are you a Canadian citizen?: ___ Yes ___ No
 - a. If you are a Canadian citizen, do you authorize the CRA to provide your name, address, date of birth, and citizenship to Elections Canada to update the National Register of Electors? Yes No

IDENTIFICATION: TAXPAYER INFORMATION CONTINUED

B. Spousal information

1. Name (First, Last): _____
2. Social Insurance Number (SIN#): _____
3. If we are not preparing the income tax return for your spouse, please indicate their net income for 2024 (line 23600 on your spouse’s tax return): _____

The information below is only required if we are preparing a spousal return:

4. Email address: _____
5. Telephone number (preferred): _____ Secondary: _____
6. Date of Birth (MM/DD/YYYY):
7. Employed: Self-Employed:
 - a. If you are self-employed, please indicate the type of work and industry: _____
 - b. Name of present employer: _____
8. Were you born in the U.S. or are you a U.S. citizen?: Yes No
 - a. If you answered yes to #9, please attach a copy of your finalized 2024 U.S. Federal and/or state tax return. If you have received your notice of assessment for your 2024 U.S. return, please attach this documentation as well.

C. Dependant information

Dependant Name	Relationship to self	Date of birth	Net Income (line 23600, if we are not preparing their return)	Social Insurance Number (if available)	Physically or mentally infirm?
					Yes / No
					Yes / No
					Yes / No
					Yes / No

FOREIGN PROPERTY

Did you own foreign properties* at any time in 2024 with a total cost of more than Cdn. \$100,000? _____ YES _____ NO

*Examples of foreign properties are: foreign bank accounts, shares of foreign corporations, real properties located outside of Canada, and loans made to non-residents.

Foreign properties do not include: vacation properties and foreign investments held in a Canadian registered securities dealer.

DISPOSITION OF REAL PROPERTY

Did you dispose of a real property in 2024? If yes, then please complete the following:

- i) Address:
- ii) Proceeds of disposition:
- iii) Year of acquisition:
- iv) Number of years designated as principal residence:
- v) Do you own more than one property? Please select one

DIRECT DEPOSIT

To sign up or change your direct deposit information with the CRA, please fill out the banking information below and attach a photocopy of a VOID cheque for your personal bank account.

Branch number _____ Account number _____

Financial Institution name: _____

Address: _____ Postal Code _____

Telephone No. _____

Exact name of account holder if different from yourself _____

RENTAL PROPERTY INCOME AND EXPENSES SUMMARY

(If you did not own a rental property in 2024, please leave schedules blank.)

(If the following summary is completed, you do not need to submit any receipts.)

1st Property	2nd Property	3rd Property
Address	Address	Address
City, province, postal code	City, province, postal code	City, province, postal code
Percentage of ownership	Percentage of ownership	Percentage of ownership
Ownership type	Ownership type <input type="text"/>	Ownership type

DESCRIPTION	Amount		
	1st Property	2nd Property	3rd Property
Rental income			
Other income			
Advertising			
Insurance			
Mortgage interest			
Office expenses			
Professional fees (legal, accounting)			
Management fees			
Repairs & maintenance			
Salaries, wages, and benefits			
Property taxes			
Utilities			
Automobile expenses - see 'Automobile Expenses' pg. 12			
Other expenses (please specify):			
Personal % of rental expenses	%	%	%
Type (drop down menu - please select one)			

During the year, did you carry out any renovations or acquire any furnishings, appliances?				
Name of Vendor	Description	Amount		
		1st Property	2nd Property	3rd Property

PLEASE ATTACH ALL APPLICABLE INFORMATION SLIPS OR NECESSARY DETAILS

BUSINESS OR PROFESSIONAL INCOME AND EXPENSES

(If you did not have self-employed business/professional income in 2024, please leave this page blank)

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If you are an HST - registrant please provide your HST business number:
 Would you like us to prepare your HST return: _____ Yes _____ No

Income	Amount
Business/professional income (including GST/HST if applicable)	
HST collected (if applicable)	
Expenses (Please use the gross amount including HST paid if you have elected to use the Quick Method of Accounting)	
Advertising	
Meals and entertainment	
Insurance	
Interest	
Bank charges	
Professional memberships and dues	
Office expenses	
Supplies	
Professional fees (legal and accounting)	
Management fees	
Rent	
Repairs & maintenance	
Wages, salaries and benefits	
Property taxes	
Travel expenses (Note: Do not include automobile expenses , see below)	
Utilities	
Telephone & internet	
Postage & delivery	
Automobile expenses - see 'Automobile Expenses' pg. 12	
Capital assets purchased (e.g. furniture, equipment, computer equipment, etc.) <u>Please include a photocopy of each purchase invoice</u>	
Private health services plan premiums	
Professional development (e.g. Conferences - note: do not include meals. Please include meals in 'Meals & entertainment' above.)	
Home office expenses - see 'Home Office Expenses' chart on pg. 13	
Other (Specify):	

EMPLOYMENT EXPENSES (AUTHORIZED AND UNREIMBURSED)

If you incurred employment expenses and received a signed T2200 authorized by your employer. Please complete the following summary.

If you did not incur expenses authorized by your employer in 2024, leave this page blank.

Expenses	Amount
Is a signed T2200 enclosed?	
Travel meals	
Hotels and other accommodation	
Air and rail fares	
Taxi and public transit	
Parking	
Office supplies	
Other supplies (please specify)	
Telephone & internet	
Professional fees (legal and accounting)	
Advertising/promotion	
Meals & entertainment (for clients)	
Professional memberships and dues	
Postage & delivery	
Other office expenses	
Auto rental	
Home office expenses - see 'Home Office Expenses' chart on pg. 13	
Automobile expenses - see 'Automobile Expenses' chart on pg. 12	
Other employment expenses (please specify):	

AUTOMOBILE EXPENSES

Automobile Information	
Make	
Model	
Year	
Original purchase price	
Date of acquisition, if acquired in 2024 (please provide a copy of the purchase or lease agreement)	
Total number of KM driven in 2024 (please provide a precise number)	
Total number of business KM driven in 2024 (please provide a precise number)	
Automobile Expenses	Amount
Gas expense	
Financing interest expense	
Insurance expenses	
License & registration fees	
Repairs & maintenance expense	
Leasing costs	
Other automobile expenses (please specify):	
Parking and tolls expense	
Change in Automobile during the Year	Amount
Sale proceeds of the previously owned automobile	

PLEASE ATTACH ALL APPLICABLE INFORMATION SLIPS OR NECESSARY DETAILS

HOME OFFICE EXPENSES

Home Office	
Total area of home office (sq ft)	
Total area of home (sq ft)	
Home office expenses:	Amount
Heat	
Electricity	
Insurance	
Repairs & maintenance	
Mortgage interest	
Property tax	
Water and sewage	
Condo fees	
Rent	
Other expenses (please specify):	

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COMMENTS

Please fill in any other comments or information you feel is pertinent to your 2024 tax year.

