



Individual Tax Return Checklist

If you are a new client referred by one of our previous clients, enter their **promotion code** to save 5 % on your personal tax return fees: _____

Section A (Personal Information):

***** For section A and B, if you provided this information in 2023 and it has not changed since then you can enter a dash (–) and skip that question. Like for your First name, Last name, SIN, Home address, Email address, Telephone, Marital status, your Status in Canada or your children information.(1)**

First Name: _____ Last Name: _____

SIN Number: _____

Date of Birth: _____ (YYYY-MM-DD)

Current Home Address: (2)Unit/Apt _____ Street Address _____

City _____ Province _____ Postal code: _____

If you want CRA letters to be mailed to another address other than your home address please write your mailing address here? _____ (3)

Email address: _____

Telephone: _____

Preferred language:

☐English ☐French

How do you want to receive your notices of assessment?

☐Paper ☐Email

Marital Status:

☐Married ☐Living Common-law ☐Widowed

☐Divorced ☐Separated ☐Single

Does your spouse live in Canada?

☐YES ☐NO

Did you come to Canada in 2024?

☐YES ☐NO

If yes, please enter the date of entry? _____ (YYYY-MM-DD)

If yes, Enter your world income from January 1, 2024 until the date you came to Canada?(4) \$ _____

What was your status in Canada in 31 December 2024?

☐Study Permit ☐Work Permit ☐Tourist ☐Permanent Resident ☐Citizen

Are you filing an income tax return with the CRA for the first time?

☐YES ☐NO



Section B (Dependents' Information):

Children Information	Child 1	Child 2	Child 3
First name			
Last name			
Sex			
Date of Birth			
Social Insurance Number			
Tuition			

**If you have more than three dependant, please use an additional sheet.

***** From here it is related to 2024 and should be filled anyway (5)**

Section C (2024 Information):

In which province or territory did you live on December 31, 2024? _____

Were you confined to a prison for a period of 90 days or more in 2024? ☐ YES ☐ NO

Did you own specified foreign property with a total cost of more than \$100,000 in 2024 (answer for properties that are not for your personal use)? (6) ☐ YES ☐ NO

If yes, how much does it worth in Canadian dollars: \$ _____

If it is equal or more than 250,000, what kind of property it is? _____

Do you agree that it is your responsibility to properly report your income, allowable credits and deductions?

Business Solutions co ☐ YES ☐ NO

How much did you pay for a rental home or property tax for owned home in 2024? (Please do not enter monthly amount, write the total amount you paid in 2024 for each address) (7)

Home	Address and postal code (Unit/Apt - Street Address, City, Province, Postal Code)	Number of months in 2024	Total amount paid for rent	Total amount paid for property tax (if you own a home)
Home 1				
Home 2				
Home 3				

Section D (Income Information)(8):

#	Question	Check if YES	Required Document
1	Did you receive employment income?	<input type="checkbox"/> YES <input type="checkbox"/> NO	T4
2	Did you have other income (other than employment income and self-employed)? (9)	<input type="checkbox"/> YES <input type="checkbox"/> NO	Please explain in the empty box provided at the end of checklist
3	Did you have self-employment income? (e.g. Uber)	<input type="checkbox"/> YES <input type="checkbox"/> NO	Please download and fill the self-employed form
4	Did you earned rental income? (10)	<input type="checkbox"/> YES <input type="checkbox"/> NO	Please fill Section E
5	Did you pay for Childcare?	<input type="checkbox"/> YES <input type="checkbox"/> NO	Related documents
6	Did you receive EI income? (11)	<input type="checkbox"/> YES <input type="checkbox"/> NO	T4E
7	Did you receive a scholarship?	<input type="checkbox"/> YES <input type="checkbox"/> NO	T4A
8	Did you pay tuition for a semester in 2024? (12)	<input type="checkbox"/> YES <input type="checkbox"/> NO	T2202
9	Did you have investment income? (E.g. Dividends, Interests, income from investment in mutual funds) (13)	<input type="checkbox"/> YES <input type="checkbox"/> NO	T3 / T5
10	Did you have any medical expenses not covered by your insurance? (14)	<input type="checkbox"/> YES <input type="checkbox"/> NO	Receipt
11	Did you pay an health insurance premium to university or an insurance company? (15)	<input type="checkbox"/> YES <input type="checkbox"/> NO	Plan name and the amount you paid
12	Did you have donations?	<input type="checkbox"/> YES <input type="checkbox"/> NO	Receipt
13	Do you, your spouse or your dependents have a disability?	<input type="checkbox"/> YES <input type="checkbox"/> NO	Related documents
14	Did you buy a home for the first time in 2024? (16)	<input type="checkbox"/> YES <input type="checkbox"/> NO	Related documents
15	Did you dispose of your principal residence in 2024? (E.g. Having sold a home)	<input type="checkbox"/> YES <input type="checkbox"/> NO	Related documents
16	Do you have any dependents (Other than your spouse and children)?	<input type="checkbox"/> YES <input type="checkbox"/> NO	Related documents
17	Did you move to another city to find a job or begin full time attendance at an educational institution? (17)	<input type="checkbox"/> YES <input type="checkbox"/> NO	Please fill Section G
18	Did you contribute in RRSP/FHSA investment plans? (18)	<input type="checkbox"/> YES <input type="checkbox"/> NO	FHSA in 2024, RRSP From March 2, 2024 to March 3, 2025
19	Are you an elementary or secondary school teacher or early childhood educator?	<input type="checkbox"/> YES <input type="checkbox"/> NO	Documents for your expense
20	Did you have foreign income? (e.g. if you worked in the US or other countries) (19)	<input type="checkbox"/> YES <input type="checkbox"/> NO	Tax return filed in that country
21	Did you work from home?	<input type="checkbox"/> YES <input type="checkbox"/> NO	T2200 and fill Section F
22	Do you want CRA deposit your refunds, benefits and/or credits directly into your bank account? (if not already set)(20)	<input type="checkbox"/> YES <input type="checkbox"/> NO	Void Check or Bank account information

Section E (Rental Income): (10)

The address of your rental properties: _____

Postal code: _____

Total rental income in 2024: _____

Expenses:

Advertising: _____ Insurance: _____

Interest and Bank charges: _____ Repairs and maintenance: _____

Management and administration fees _____ Professional fees (including legal and accounting fee) _____ Property tax: _____ Travel: _____ Utilities: _____

Other expenses: _____

Personal usage percentage: _____

If you have co-owners please write their full name, percentage of ownership and share of rental income or loss?

Section F (Work from home Information):

Do you have all of the receipts for your work from home expenses: ☐ Yes ☐ No

Do you have T2200 from your employer for your work from home expenses: ☐ Yes ☐ No

What type of space do you work from at home? (21)

☐ Designated work space (room) ☐ Common (shared) space

Your work space area _____ m2, Your total home area _____ m2

How many hours a week have you worked from home? _____

For below expenses write the total amount you paid during your working from home period in 2024.

Rent: \$ _____ Total amount of electricity, heat, water, internet: \$ _____

Maintenance for (cleaning supplies, light bulbs, etc): _____

Section G (Moving Expenses): (17)

The main reason for the move

☐ To work or to run a business

☐ To study full time

New company name:

New company address _____

Postal code _____

Distance in kilometers between your old home and your new place of work or educational institution _____

Distance in kilometers between your new home and your new place of work or educational institution _____

The address of your old home _____ Postal code _____

The address of your new home _____ Postal code _____

Date of move (YYYY-MM-DD) _____

The date you started your new job or business or your study (YYYY-MM-DD) _____

How much you paid for moving and storage of your household items? \$ _____

Traveling expenses:

Number of household members in move _____

Method of travel ☐ Personal car ☐ U-Haul

Number of Kilometers you traveled with your car _____

How much you paid for travel expenses (gas) \$ _____

How many nights you had temporary accommodation during your travel? _____

How much you paid for temporary accommodation during travel? \$ _____

How much you paid for the meal during travel? \$ _____

Temporary living expenses near new or old residence (maximum 15 days)

How many nights you had temporary living near your new or old residence? _____

How much you paid for temporary living near your new or old residence? \$ _____

How much you paid for meal during temporary living near your new or old residence? \$ _____

If you sold your old residence home and/or bought a new home in the new city you are moving to, please give us the information of the costs related to each one.

****Note:** You should have receipt to prove your expenses, but don't send them to us. Keep them in case CRA asked for it.

****For meal and vehicle expenses (gas)** you don't need to have all the receipts, only enter the number of Km you drove, number of days and family members and we will calculate a flat-rate for you.

Additional Info: