



2024 Personal Tax Checklist

Note: Please save this document to your computer before filling out the pdf. This ensures that your information is saved correctly within the document.

Personal Information (Complete only if there were changes from last year or you are a new client)			
Full Name		S.I.N.	Birthdate (MM/DD/YYYY)
Mailing address: Apt No. - Street No. Street name			
City		Province or territory	Postal code
PO Box	RR	Marital status at December 31, 2024 ☐ Married ☐ Living common-law ☐ Widowed ☐ Divorced ☐ Separated ☐ Single	
Primary Phone	Secondary Phone	Email	
If your marital status changed during the year, please provide the date it changed: (MM/DD/YYYY)			
Disability Tax Credit?		☐ YES ☐ NO	
Are you a Canadian citizen?		☐ YES ☐ NO	
Do you authorize CRA to provide information about you to Elections Canada?		☐ YES ☐ NO	
Did you reside on Nisga'a Lands on December 31, 2024?		☐ YES ☐ NO	
If YES , are you a citizen of the Nisga'a Nation?		☐ YES ☐ NO	
Were you a volunteer firefighter or a search and rescue volunteer during the year?		☐ YES ☐ NO	
Did you open a First Home Savings Account (FHSA) in 2024?		☐ YES ☐ NO	

Spouse's Information		
Full Name	S.I.N.	Birthdate (MM/DD/YYYY)
If we are not preparing your spouse's tax return: Taxable Income from line 26000 of their tax return:		

Children's Information (Returning clients only need to complete this section if you had a child during the year)

Full Name - Child 1	S.I.N.	Birthdate (MM/DD/YYYY)
Attending Post-Secondary? ☐ YES ☐ NO	If YES , please include signed T2202A	
Full Name - Child 2	S.I.N.	Birthdate (MM/DD/YYYY)
Attending Post-Secondary? ☐ YES ☐ NO	If YES , please include signed T2202A	
Full Name - Child 3	S.I.N.	Birthdate (MM/DD/YYYY)
Attending Post-Secondary? ☐ YES ☐ NO	If YES , please include signed T2202A	

Sale of Principal Residence

Did you sell your principal residence during the year? ☐ YES ☐ NO			
If YES : Year of purchase:		Proceeds of disposition:	
Address of Property			
City	Province	Postal Code	

Foreign Reporting

Do you own foreign assets with a cost greater than \$100,000 CAD? ☐ YES ☐ NO	
If YES : Please provide statements showing: Country of Origin, Fair Market Value at Year-End, Highest Fair Market Value for the Year, Total Income and Total Capital Gains.	

Income Sources

Employment (T4 or T4A) ☐	RRSP, RRIF, RESP (T4RSP/T4RIF/T4A) ☐
Government Pensions (T4A[OAS]/T4A[P]) ☐	Estates/Trusts/Mutual Fund (T3) ☐
Employment Insurance (T4E) ☐	Interest/Dividends/Capital Gains (T5/T5008) ☐
Partnerships (T5013) ☐	
Rental Income and <i>Expenses</i> (Please complete the rental property section) ☐	Self-Employment Income and <i>Expenses</i> (Please complete the self-employment section) ☐

Tax Deductions/Credits (Please provide official receipts)	
RRSP Contributions ☐	Student Loan Interest ☐
Union/Professional Dues ☐	Medical Expenses ☐
Childcare Expenses ☐	Charitable or Political Donations ☐
Interest/Fees Paid on Investments ☐	First-time Home Buyer ☐
Accounting Fees ☐	Teacher's Supplies ☐
Moving Expenses (Please complete the moving expenses section) ☐	Tuition Fees (Provide form T2202A) ☐
FHSA contributions (T4FHSA) ☐	Note: Form T2202A needs to be signed by the student if unused tuition amounts are to be transferred to a designated individual.
Multigenerational Home Tax Credit (Provide supporting documentation) ☐	

Other Information/Documents	
Mutual Funds Summary Statement ☐	Court-Ordered Spousal Support Payments: Paid ☐ Received ☐
Sales of Shares: Gain/Loss Summary ☐	
T2200 Employer Authorization for Expenses. Please include a detailed listing of all expenses. ☐	New Clients: T1 Tax Return Filed in Prior Year ☐

Self-employment(Please provide all business income and expenses for the year)	
Business number (If applicable)	
Main product or service	
Was this your last year of business?	☐ YES ☐ NO
Do you own 100% of the business?	☐ YES ☐ NO
Do you use a portion of your principal residence for business purposes?	☐ YES ☐ NO
If YES , please provide the percentage of your home used for business, heat, electricity, insurance, maintenance, mortgage interest, property taxes for the year.	
Does your business require you to use a vehicle to earn self-employment income?	☐ YES ☐ NO
If YES , please provide the percentage of the time your vehicle is used for business purposes.	

Cryptocurrency		
Did you own cryptocurrency at any point during 2024?	☐ YES	☐ NO
Was the cost of your cryptocurrency holdings over \$100,000 at any point in 2024?	☐ YES	☐ NO
How many hours per week did you spend on cryptocurrency activities in 2024?		
Did you mine cryptocurrency in 2024?	☐ YES	☐ NO
If YES, please provide the following: • receipts for the purchase of cryptocurrency mining hardware • receipts to support the expenses and other records associated with your mining operation • the mining pool details and records		
Did you trade cryptocurrency in 2024?	☐ YES	☐ NO
If YES, please provide the following: • the date of the transactions • the receipts of purchase or transfers of cryptocurrency • the value of the cryptocurrency in Canadian dollars at the time of the transaction • the digital wallet records • the exchange records • accounting and legal costs • the software costs related to managing the tax affairs		
Did you operate a cryptocurrency exchange (including ATM's) in 2024?	☐ YES	☐ NO
Did you own a business that accepts cryptocurrency in exchange for goods or services in 2024?	☐ YES	☐ NO

Rental property (Please provide the revenue and expenses for each rental property)**Property #1**

Apt No. - Street No. Street name		
City	Province or territory	Postal code
Was this the final year of your rental operation?		☐ YES ☐ NO
Did you buy or sell this rental property during the year?		☐ YES ☐ NO
Was this property used for short-term rentals (Airbnb)?		☐ YES ☐ NO
If YES , please provide the purchasers statement of adjustments (bought) or the sellers statement of adjustments (sold)		

Property #2

Apt No. - Street No. Street name		
City	Province or territory	Postal code
Was this the final year of your rental operation?		☐ YES ☐ NO
Did you buy or sell this rental property during the year?		☐ YES ☐ NO
Was this property used for short-term rentals (Airbnb)?		☐ YES ☐ NO
If YES , please provide the purchasers statement of adjustments (bought) or the sellers statement of adjustments (sold)		

Property #3

Apt No. - Street No. Street name		
City	Province or territory	Postal code
Was this the final year of your rental operation?		☐ YES ☐ NO
Did you buy or sell this rental property during the year?		☐ YES ☐ NO
Was this property used for short-term rentals (Airbnb)?		☐ YES ☐ NO
If YES , please provide the purchasers statement of adjustments (bought) or the sellers statement of adjustments (sold)		

Moving Expenses (Please provide all expenses relating to your move)

Date of move	Date you started your new job or business, or your studies
Main reason for moving	☐ To work or run a business ☐ To study full time

Address of your employer, business, or educational institution after the move:

Name		
Street number, street name		
City	Province or territory	Postal code
Country (if outside of Canada)		
How many household members in the move?		
What was your method of travel from the old location to the new location?		
How many days did it take to travel from the old location to the new location?		
Did you sell a house at your previous location?		☐ YES ☐ NO
If YES , please provide the sellers statement of adjustments		
Did you purchase a house at your new location?		☐ YES ☐ NO
If YES , please provide the purchasers statement of adjustments		
Were you reimbursed for any of your moving expenses?		☐ YES ☐ NO
If YES , please provide the amount you were reimbursed		

Additional Information/Documents

Please let us know if there is additional information that is relevant to your personal tax return:
