

# Personal Tax Checklist

## New & Returning Clients

**Name:**

(The one on file with the CRA)

**Email Address:**

*For returning clients, if your address has changed, please fill in your new address below:*

<b>Home Address:</b>				
	Street	City	Prov.	Postal Code
<b>Home Phone:</b>		<b>Cell Phone:</b>		<b>Work Phone:</b>
<b>Birth Date:</b> DD/MM/YYYY		<b>SIN</b>		<b>Are you a Canadian Citizen?</b> Yes      No

### Marital Status

<b>Single</b>	<b>Married</b>	<b>Separated</b>	<b>Divorced</b>	<b>Widowed</b>	<b>Common-Law</b>
<b>Did your marital status change within 2024?</b>					
	<b>No</b>				
	<b>Yes. If yes, please provide the date of change:</b>				

**\*\*Spousal Information – If we are not preparing their returns (this is required information)**

<b>Full Name</b>		<b>SIN</b>	
<b>Date of Birth</b> (dd/mm/yyyy)		<b>Net Income in 2024</b>	

### Dependants:

*For returning clients, if there were any additions to your family or dependents in 2024, please list below.*

<b>Name</b>	<b>SIN</b>	<b>Birth Date</b> (dd/mm/yyyy)	<b>Net Income</b> (if applicable)

**Please Identify all the taxpayers we will be filing for:**

Name	SIN	Birth Date

### Real Estate

**Did you sell, gift or change the use of any piece of Real Estate in 2024?**

	<b>No</b>
	<b>Yes. If yes, **see Real Estate Checklist.</b>

### Foreign Income Verification

**Did you own specified foreign property (certain properties outside of Canada) totaling more than \$100,000 CAD at any time during 2024?**

**Yes**

**No**

**Specified foreign property includes but is not limited to: Foreign bank accounts, shares owned in non-resident corporations, real estate located outside of Canada (that is not personal use).**

**Please refer to the following link:**

<https://www.canada.ca/en/revenue-agency/services/tax/international-non-residents/information-been-moved/foreign-reporting/questions-answers-about-form-t1135.html>

**If yes, then you will have to declare the ownership and details of the property and income earned from the property on Form T1135 – Foreign income verification statement. There are substantial penalties for non-compliance.**

## B.C. Renters Tax Credit

If you paid rent in 2024 and would like us to claim the B.C. Renters Tax Credit for you; please fill out the below:

Property #1	
Rental Address	
Rent Paid Monthly	\$
Number of Months Tenancy	
Name of Landlord	
Property #2	
Rental Address	
Rent Paid Monthly	\$
Number of Months Tenancy	
Name of Landlord	

Income	
Personal	Investment***
T5, T4PS – Interest and Dividends	T3, T4, T4A – Salaries and Employment Income
T4A (P) – CPP Benefits	T5008 – Statement of Security Transactions
T4 (OAS) – Old Age Security Benefits	Interest on prior year tax refund
T4A – Other Pensions or Superannuation	Realized Gain/Loss report
T4RIF – RRIF Income	T3 – Income from Mutual Funds
T4E – Employment Insurance Benefits	Annuities
T5007 – Social Services Benefits	Rental Income **see <i>Rental Income Checklist</i>
T4RSP – RRSP Income	T5013 – Net Partnership Income (Loss) any Limited Partnership
Other Employment Benefits	
T4A/ T4E - CERB	
Self-Employment income **see <i>Self Employment Checklist</i>	
<b>***If your investment accounts are managed by an advisor, please instruct your advisor to send us your full 2024 tax package.</b>	
Other	
RRSP Contributions	Installment Payments \$ _____
First Home Savings Account (FHSA): Did you open a FHSA account in 2024? <b>Yes</b> <b>No</b>	Childcare Expenses (Full details required)
Union, Professional Dues	Moving Expenses (Full details required)
Spousal support payments	Employment Expenses (please include T2200 form "Declaration of Conditions of Employment") **see <i>Employment Expense Tax Checklist</i>
Medical/Attendant Care Expenses	Investment Counsel and Accounting Fees
Interest & Carrying Charges on Investments	T2202 Tuition Slips

**Please note that this list was compiled to include some of the more common income, deductions, and tax credits that we see. Everyone's tax situation is unique so if you have any questions, please make additional notes, or give our office a call.**

**For other referenced checklists, please visit our website at [www.ospreypac.ca](http://www.ospreypac.ca)**