T1 Checklist - 2024

PERSONAL INFORMATION

Taxpayer 1

NAME: ____

ADDRESS: ____

SOCIAL INSURANCE NUMBER: __________________ DATE OF BIRTH D/M/Y: ________________________

DID YOU MOVE DURING THE YEAR? ____________ PROVINCE OF RESIDENCE ON DECEMBER 31, 2024: ___

MARITAL STATUS: __________
@ Dec 31, 2024

DID YOUR MARTIAL STATUS CHANGE IN 2024? ____
ARE YOU A U.S. CITIZEN OR GREENCARD HOLDER? ____

PHONE NUMBER (Home) _________________ (Work) _________________ (Cellular) ____________________

(E-mail address) ____

Taxpayer 2

IF MARRIED OR COMMON LAW - NAME OF SPOUSE: ____

ADDRESS (If different from above): ____

SOCIAL INSURANCE NUMBER: ____________________ DATE OF BIRTH D/M/Y: _________________________

ARE YOU A U.S. CITIZEN OR GREENCARD HOLDER? _______

PHONE NUMBER (Home) _________________ (Work) _________________ (Cellular) ____________________

(E-mail address) ____

DEPENDANTS	DEPENDANT 1	DEPENDANT 2	DEPENDANT 3
NAME			
ADDRESS (if different from yours)	_______	_______	_______
SOCIAL INSURANCE	_______	_______	_______
DATE OF BIRTH D/M/Y	_______	_______	_______
TUITION FEES	_______	_______	_______

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T1 Checklist - 2024

Complete the Following Schedules Separately for Each Taxpayer Where Applicable

Check if Applicable	**INFORMATION REQUIRED**

INCOME

If you received income from any of the sources listed below please attach the information required:

☐ Salary or Wages or Commissions or Director’s or Other Fees or Retiring Allowance	☐ T4 or T4A
☐ Old Age Security Pension, Canada Pension, Other	☐ T4A(OAS), T4A(P)
☐ Foreign Pensions (including U.S. Social Security)	☐ List details
☐ Employment Insurance Benefits	☐ T4E
☐ Dividends and Interest (Canada Savings Bonds, Banks, etc.)	☐ T5
☐ Foreign Dividends and Interest	☐ List or foreign slips
☐ Dividends and Interest (Estate or Trust Income, Trust Companies, etc.)	☐ T3
☐ Other Interest - Mortgage, Loans, other Securities and Income Tax Refunds	☐ List/brokerage slips/details
☐ Annuities (indicate if received amount due to the death of your spouse)	☐ T4A or list
☐ Rental Income	☐ See attached checklist
☐ Self-employed	☐ See attached checklist
☐ Capital Gains or Losses	☐ Details/Broker Statements
☐ Business/Professional Income	☐ Income Statement
☐ Limited Partnership Income or Loss (include financial statements)	☐ T5013, T5013 S(1)
☐ Withdrawal of RRSP Funds	☐ T4 RSP
☐ Alimony, Separation Allowances	☐ Details
☐ Scholarships or Research Grants	☐ T4A (or list)
☐ Profit Sharing Plans	☐ T4PS
☐ Registered Retirement Income Funds	☐ T4RIF
☐ Other Income	☐ List or T4A
☐ Guaranteed Income Supplement*	☐ List, T4A(OAS)
☐ Workers’ Compensation Payments*	☐ List, T5007

* Although the above two amounts are not taxable, they are considered to be income for purposes of determining your eligibility for certain credits and if you are considered a dependent of someone else.

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Check if Applicable	INFORMATION REQUIRED

DEDUCTIONS AND CREDITS

If you made any of the following payments, please attach the information required.

☐ Registered Retirement Savings Plan (RRSP) Contributions	☐ Official receipts
☐ First Home Savings Account (FHSA) Contributions	☐ Official receipts
☐ Annual Professional or Union Dues	☐ Official receipts
☐ Child Care Expense	☐ Receipts
☐ Carrying Charges on Investment Income (Loan Interest, Investment Fees, Accounting Fees)	☐ Details
☐ All Income Taxes paid or payable to Foreign Governments	☐ Proof of payment
☐ Moving Expenses	☐ Receipts and details
☐ Alimony, Separation Allowances	☐ Details
☐ Legal Fees paid to collect Taxable Income such as Alimony or Salary	☐ List
☐ Digital News Subscription Tax Credit (DNSTC) - $500 maximum	☐ Receipts
☐ Charitable Donations	☐ Official receipts
☐ Medical and Dental Expenses (includes premiums paid to private health care plans, but excludes expenses for which you are reimbursed by the plans)	☐ Receipts
☐ Adoption Expenses	☐ Receipts
☐ Political Donations	☐ Official receipts
☐ Salesperson's Expenses (automobile, travel, entertainment, etc.)	☐ Categorized list of amounts/T2200
☐ Home office expenses	☐ Refer to attached checklist
☐ Tax Instalment payments remitted towards your 2024 taxes	☐ Details or info from CRA

T1 Checklist - 2024

OTHER ITEMS

□ Were you a student in full-time attendance at a University or College, or in a full-time correspondence course at any time during the year?	□ T2202A
□ Were any of your dependants students in full-time attendance or in a full-time correspondence at a University or College who did not use all of the tuition or education credits?	□ T2202A
□ Were you, or any of your dependants', students in full-time attendance at a foreign University or College at any time during the year?	□ TL11A, TL11C, TL11D
□ Are you, your spouse or a dependant child severely disabled? A medical practitioner must certify that the individual has a severe and prolonged impairment.	□ T2201
□ Do you receive a motor vehicle or travel allowance that is included in your T4?	□ Details, on what is it based

□ Are you or your spouse U.S. citizens or holders of "Green Cards"? Under U.S. tax law all such people are required to file U.S. income tax returns and report their worldwide income every year. Any U.S. tax paid can be claimed as a Foreign Tax Credit on your Canadian tax return.

□ If you or your spouse spent over 60 days in the U.S. in any of the last three years, please list the numbers of days in the U.S. for each year listed below.

2024 ________
2023 ________
2022 ________

FOREIGN REPORTING (must be completed for each taxpayer separately including you, your spouse and all your dependants)

□ Did you own or hold foreign property with an aggregate cost of CAD$100,000 or more during the year? For example, did you own any foreign rental property or foreign stocks held in Canadian or U.S. broker accounts?

□ Are you the beneficiary of a non-resident trust or have you loaned funds to a non-resident trust?

SALE OF PRINCIPAL RESIDENCE

□ Any disposition of a property for which the total or partial exemption for principal residence is claimed must be reported on your tax return. If you sold a principal residence during the year, provide the following:

- Address of property, proceeds of disposition, acquisition cost of property, renovations to the property, and year it was originally acquired.

T1 Checklist - 2024 SELF EMPLOYED

CHECKLIST FOR THE SELF-EMPLOYED (page 1 of 2)	☐	Amount Excluding GST$	GST$
NOTE: If registered for GST/HST, indicate the GST/HST received/paid in your listing below by item			
If registered for GST/HST indicate GST account number ( ) & indicate if quick method election filed			
REVENUE earned during the year →	☐		
EXPENSES:			
Advertising	☐		
Convention Expenses	☐		
Insurance	☐		
Interest	☐		
Interest and Borrowing Charges	☐		
Health Plan Premiums	☐		
Home Office	☐		
Square Footage of Home Office Space and Total Home Footage	☐		
Rent or Mortgage Interest (not principal repayments)	☐		
Property Tax	☐		
Home Insurance	☐		
Annual Utilities			
Heat	☐		
Hydro	☐		
Water	☐		
Cable and Internet	☐		
Telephone and Internet	☐		
Maintenance and Repairs	☐		
Leasing Costs	☐		
Meals and Entertainment Expenses	☐		
Automobile			
Own or Lease (indicate make of car, if leased - provide detail lease agreement if new in 2024)	☐		
Was there a Change in the Tax Year? (details - i.e., disposals)	☐		
If Lease, Lease Cost Per Month (indicate HST amount, if included)	☐		
If Own, Interest Cost Per Month	☐		

T1 Checklist - 2024 SELF EMPLOYED

CHECKLIST FOR THE SELF-EMPLOYED (page 2 of 2)		Amount Excluding GST$	GST$
Odometer @ Beginning of Year	☐		
Odometer @ End of Year	☐		
Percentage of Business Use of Car	☐		
Fuel Expenses	☐		
Car Insurance	☐		
Repairs and Maintenance	☐		
Parking expenses	☐		
Highway Tolls	☐		
License and Registration	☐		
Equipment Purchases subject to CCA			
Furniture and Equipment	☐		
Computer Equipment	☐		
Leaseholds (if rental property)	☐		
Office Expenses			
Telephone and Fax	☐		
Stationary Supplies	☐		
Internet	☐		
Professional Membership Dues/Fees	☐		
Accounting Fees	☐		
Legal Fees	☐		
Salaries Paid (provide T4 Summary for 2024)	☐		
Travel Expenses	☐		
List other Expenses	☐		

T1 Checklist - 2024 RENTAL PROPERTY INFORMATION

Did you purchase the property in the current year? [Yes/No]: ______ Shared with spouse? [Yes/No] _____ Personal use %: ____

Address: ____ Your partnership %: _____ Number of units: ______

Rental revenue earned during the year: ____________________

EXPENSES (enter total expenses, not prorated amounts)	TOTAL
Purchase Price Paid (split between land/building?)	
Advertising	
Insurance	
Mortgage Interest	
Repairs and Maintenance	
Condominium Fees	
Management and Administration Fees	
Automobile Expenses	
Office Expenses	
Legal, Accounting and other Professional Fees	
Property Taxes	
Salary, Wages and Benefits	
Travel	
Electricity, Hydro	
Water	
Gas	
Cable and Internet	
Security	
Landscaping/Snow removal	
Bank Charges	

Did you sell the property in the current year? [Yes/No]: ______ If yes, the please provide the following:

Proceeds of disposition (split between land/building)	
Purchase price (split between land/building)	
Capital cost allowance claimed in all prior years	

T1 Checklist - 2024 HOME OFFICE EXPENSE DEDUCTION

As an employee, you may be able to claim certain home office expenses (work-space-in-the-home expenses, office supplies, and certain phone expenses). For 2024, there is only one option: the **detailed method**.

Detailed method:

- If filing under the **detailed method**, we require that you provide us a completed and signed Form T2200 from your employer, as well as details of your home office amounts paid supported by documents.

- You cannot claim any expenses that were or will be reimbursed by your employer.

- Eligible employees can claim the employment portion of actual amounts paid.

  Common home office expenses may include the following:
  - Office supplies (if required by employer) ______________
  - Cell phone (if required by employer) ______________
  - Utilities (i.e. electricity, heat, water) ______________
  - Rent ______________
  - Internet (monthly home internet access fee) ______________
  - Property taxes (commissioned employees only) ______________
  - Home insurance (commissioned employees only) ______________

- Mortgage interest cannot be claimed by either employees or commissioned employees, only by self-employed individuals.

- The portion of the workspace used for employment purposes compared to the total finished area of their home is used as a basis for calculating the employment portion of the home office expenses.

  - What is the office space as a percentage of the total finished area of your home ________%