

2024 PERSONAL TAX CHECKLIST

Personal Information			
First name		Last name	
Has your name or last name changed in 2024? <input type="checkbox"/> Y <input type="checkbox"/> N			
Street address		City	Province
Postal code	Birthdate: yyyy / mm / dd	SIN #	
Cell phone:		Home phone:	
Main Email:			
Marital status <input type="checkbox"/> Single <input type="checkbox"/> Common Law <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed			
Canadian citizen <input type="checkbox"/> Y <input type="checkbox"/> N		American citizen <input type="checkbox"/> Y <input type="checkbox"/> N	
Completing return for spouse/partner? <input type="checkbox"/> Y <input type="checkbox"/> N If no, please provide Net Income: \$ <u>AMOUNT</u>			
Spouse/Partner First name		Last name	
Birthdate: yyyy / mm / dd		SIN #	
Spouse/Partner email (only of we are preparing taxes):			
Dependents (children or senior parent living with you) Is taxpayer 16 or older? please provide email			
Name:	Relationship	Birthdate	SIN #
Email:		yyyy / mm / dd	
Name:	Relationship	Birthdate	SIN #
Email:		yyyy / mm / dd	
Please answer all the following questions			
Do you want to provide your address and information to Elections Canada?			<input type="checkbox"/> Y <input type="checkbox"/> N
Do you own investments or property outside of Canada, which cost more than \$100,000 CDN?			<input type="checkbox"/> Y <input type="checkbox"/> N
Did you purchase any new investments in 2024? Did you change investment advisor?			<input type="checkbox"/> Y <input type="checkbox"/> N
Were you a first-time homebuyer in 2024?			<input type="checkbox"/> Y <input type="checkbox"/> N
Did you sell any real estate property in 2024?			<input type="checkbox"/> Y <input type="checkbox"/> N
For self-employed individuals / sole proprietors			
Would you like us to summarize your expenses?		<input type="checkbox"/> Yes, please summarize (extra cost would apply)	
		<input type="checkbox"/> No, I've already summarized	
Is your business or rental property registered for HST/GST? <input type="checkbox"/> Y <input type="checkbox"/> N		Filing period: <input type="checkbox"/> Regular <input type="checkbox"/> Quick	
Would you like us to complete your HST/GST return?		<input type="checkbox"/> Yes (please include required documents)	
		<input type="checkbox"/> No (please provide copy of HST/GST filed)	
Additional Notes and Questions– Family changes/dates (birth, marital status, death) please provide details. Write here all your questions and we will get in touch with you once we check your information			

We will provide a digital copy of your completed Personal Tax Return. You will receive all notification by email.

*A paper copy can be provided upon request.

There will be a **\$25** surcharge for returning your records by mail, if they are not picked up when preparation is complete.

PLEASE CHECK THE ITEMS THAT APPLY TO YOU	
Personal Income	Investment Income
<input type="checkbox"/> T4, T4A – Salaries and employment	<input type="checkbox"/> T3, T5, T4S – Interest and Dividends
<input type="checkbox"/> Other employment benefits	<input type="checkbox"/> T5008 – Statement of Security Transactions
<input type="checkbox"/> T4A (P) – Canada Pension Plan benefits	<input type="checkbox"/> Interest on Tax Refunds
<input type="checkbox"/> T4A (OAS) – Old Age Security benefits	<input type="checkbox"/> T600 – Canada Savings Bonds
<input type="checkbox"/> T4A – Other pension or superannuation	<input type="checkbox"/> T3 – Mutual Fund Income
<input type="checkbox"/> T4RSP – RRSP income	<input type="checkbox"/> Foreign income
<input type="checkbox"/> T4RIF – RRIF income	<input type="checkbox"/> Annuities
<input type="checkbox"/> T4E – Employment Insurance benefits	<input type="checkbox"/> Rental income (full details required)
<input type="checkbox"/> T5007 – WCB benefits/social services benefits	<input type="checkbox"/> Summary of investment contract holdings
<input type="checkbox"/> T1137 – Home Buyers Plan	<input type="checkbox"/> T5013 – Limited partnership income (loss)
<input type="checkbox"/> T4RCA – retirement income	<input type="checkbox"/> Capital gain/losses (full details required)
Other Income	Business Earnings
<input type="checkbox"/> Alimony received	<input type="checkbox"/> Self-employment earnings (details required)
<input type="checkbox"/> Child support received	<input type="checkbox"/> Farming/fishing earnings (details)
<input type="checkbox"/> Scholarships/bursaries	<input type="checkbox"/> Professional earnings (details)
<input type="checkbox"/> Other – specify: OTHER INCOME SOURCE	<input type="checkbox"/> Self-employment commissioned earnings (details)
Refundable & Non-refundable Credits	Other Deductions
<input type="checkbox"/> Married amount – spouse’s net income \$ AMOUNT	<input type="checkbox"/> RRSP
<input type="checkbox"/> Equivalent to married amount (full details required)	<input type="checkbox"/> Union/professional dues
<input type="checkbox"/> Disability deductions	<input type="checkbox"/> Alimony paid
<input type="checkbox"/> T2202 – tuition fees	<input type="checkbox"/> Child support paid
<input type="checkbox"/> Dependent Tuition Credit or Net Income \$ AMOUNT	<input type="checkbox"/> Interest paid on student loans
<input type="checkbox"/> Medical receipts	<input type="checkbox"/> Interest and carrying charges on investments
<input type="checkbox"/> Charitable donations	<input type="checkbox"/> Investment counsel and accounting fees
<input type="checkbox"/> Attendant care expenses	<input type="checkbox"/> Employment expenses (details required, form T2200 or T2200 S)
<input type="checkbox"/> Limited partnership losses of other years	<input type="checkbox"/> Deductible legal fees
<input type="checkbox"/> Education Coaching Amount (BC)	<input type="checkbox"/> Childcare expenses
<input type="checkbox"/> Eligible Educator School Supply Tax Credit	<input type="checkbox"/> Moving expenses (details required)
<input type="checkbox"/> Volunteer Firefighter Credit	<input type="checkbox"/> TL2 – Claim for boarding and lodging
<input type="checkbox"/> Search and Rescue Credit	<input type="checkbox"/> FHSA (first time home savings account)
Additional Documents	Other items
<input type="checkbox"/> Restricted farming losses carry forward	<input type="checkbox"/> Political contribution receipts
<input type="checkbox"/> Prior year Notice of Assessment	<input type="checkbox"/> Allowable business investment loss
<input type="checkbox"/> Installment payments for current year	<input type="checkbox"/> Employment insurance benefit repayments
<input type="checkbox"/> Details of foreign property or investments held	<input type="checkbox"/> Dependent data (GST credit and child tax benefit)
<input type="checkbox"/> Capital and non-capital losses carry forward	<input type="checkbox"/> Declaration of conditions of employment
	<input type="checkbox"/> Loss carry forward information
	<input type="checkbox"/> First time homebuyer in 2024
	<input type="checkbox"/> Sale of principal residence in 2024
IF THIS IS YOUR FIRST YEAR FILING WITH US, PLEASE PROVIDE A COPY OF YOUR PREVIOUS YEAR’S TAX RETURN.	

Have questions or need more information? Send us an email admin@lorennancke.com, phone us **604-904-3807** or please visit our website at www.lorennancke.com