



Form & Check list Personal income tax 2024

Main contact information

First name : _____
 Surname : _____
 Social insurance number : _____
 Date of birth : _____

Spouse Information

First name : _____
 Surname : _____
 Social insurance number : _____
 Date of birth : _____

Civil status

Single	Married	Divorced
Living common-law	Separated	Widowed

Contact details

Main contact	Spouse
Telephone : _____	Telephone : _____
Cellular : _____	Cellular : _____
Address : _____	
City : _____	Same address : Yes
Postal code : _____	No
Email : _____	Email : _____

Are you a Canadian citizen

Main contact : yes	Spouse : yes
no	no

Did you work from home in 2024? If yes, indicate the number of days worked from home

Main contact : _____ **Spouse :** _____

Is this your first tax return?

Main contact : yes	Spouse : yes
no	no

Have you changed province or are you a newcomer to Canada? If yes, Indicate the exact date of arrival, country of origin and income in your country, in Canadian dollars from January 1, 2024 to the day of your arrival

Main contact : Date	Income	Spouse : Date	Income
Country		Country	

Do you have properties abroad of more than \$100,000 CAD? If yes, indicate the value of the property as of December 31, 2024 and the description of the type of property held

Main contact :	Spouse :
Description _____	Description _____

Did you buy your first property in 2024? Indicate the date of purchase and attach the municipal tax bill

Main contact : _____ **Spouse :** _____

Did you sell a property during the year 2024?

Date of purchase : _____	Purchase price : _____
Date of sale : _____	Selling price : _____
Property address : _____	Other expenses (notary, etc.) : _____

Persons in charge (children under 18)

First name : _____	First name : _____
Surname : _____	Surname : _____
Social insurance number : _____	Social insurance number : _____
Date of birth : _____	Date of birth : _____
First name : _____	First name : _____
Surname : _____	Surname : _____
Social insurance number : _____	Social insurance number : _____
Date of birth : _____	Date of birth : _____



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Description	Slip/Document to attach	YES	NO
Employment income?	T4 & Relevé 1 (RL-1)		
Last resort financial assistance?	T5007		
Income for accident at work? (CNESST)	T5007 & Relevé 5 (RL-5)		
Unemployment income or COVID benefits?	T4A or T4E		
Income as self-employed?	Excel table of income and expenses		
Pension income?	T4A(OAS) - T4A(P) et relevé 2 (RL-2)		
Purchase/Sale of shares in the stock market?	Annual report and/or T5008		
Do you have cryptocurrency?	Annual report and/or T5008		
Income from dividends, interest, investments?	T5 & RL-3 - T3 & RL-16		
Have you teleworked (detailed method)	T2200S & TP-64		
Do you have private/collective insurance?	Insurance report		
Did you have health expenses? (dentist, etc.)	Expense invoices		
Do you pay rent?	RL-31		
Are you a homeowner?	Municipal tax account		
Have you contributed to a RRSP?	RRSP receipt		
Did you study in 2024 ?	T2202 & RL-8		
Do you pay interest for a student loan?	Bank loan statement		
Have you made any donations?	Donation receipts		
Do you contribute to annual union, professional or like dues?	Contribution receipts		
Do you have a rental property?	Excel table of income and expenses		
Do you have children in daycare?	RL-24		
Have your children taken art or sports lessons?	Children's activity receipt paid		
Did you file your income taxes in 2023 ?	Federal Notice of Assessment 2023 Provincial Notice of Assessment 2023		

Comments :