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2024 Tax Year Personal Income Tax Checklist

Please use the checklist below to make sure you have included all the documents for your taxes:

✓CRA Assessments:

- Last year's Notice of Assessment
- Instalment Payments

✓Employment Income:

- T4
- T4A
- T4PS

✓Employment Expenses:

- T2200 plus a list of the expenses

✓Pension Income:

- T4A
- T4AOAS
- T4AP
- T4RIF
- T4RSP

✓Investment Income:

- T3
- T5
- T5008
- T5013

✓Capital Gains:

- T5013
- Trading summaries from Brokers
- Annual statement from Mutual Funds

✓Other Income:

- Rental income and expenses information
- Self-employment income and expense information (CPP contributions/EI premiums)

✓Deductions and Credits:

- RRSP
- Childcare receipts
- Adoption expenses
- Support payment information
- Caregiver/disability amount
- Tuition fees – T2202/T2202A
- Student Loan Interest slips
- Union/Professional dues
- New Home Buyer
- Accounting fees paid on investment advice
- Donations
- Medical receipts (less any reimbursements from Insurance)
- Premiums paid to Private Medical Insurance plans