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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