

## 2024 Personal Income Tax Return Checklist

To ensure you are well-prepared to submit your income tax return, please keep the following key points in mind:

1. **Deadline:** The deadline for most Canadians to file their 2024 income tax returns is **April 30, 2025**.
2. **Timely Submission:** To facilitate the timely completion and filing of your tax returns, we kindly request that you provide all necessary documentation and information by **March 31, 2025**.
3. **Consolidate Information:** To streamline communication and ensure efficiency, we recommend sending your information in a single upload (if using our portal) or a single email.
4. **Resources:** Visit our **2024 Tax Information Publication** for helpful resources, including the Self-Employed Worksheet, and Rental Income/Expense Worksheet.

Identification Information				
Name: _____			Spouse: _____	
Date of Birth: _____			Date of Birth: _____	
Address: _____ _____			Phone: Home _____	
Email: _____			Phone: Office _____	
Dependent children	S.I.N.	Date of Birth	Did your marital status change during the year?	Yes [ ] No [ ]
_____	_____	_____		
_____	_____	_____	New status & date of change: _____	
_____	_____	_____		

Elections Canada	
Are you a Canadian citizen?                      Yes [ ] No [ ]	As a Canadian citizen, do you authorize Yes [ ] No [ ] the CRA to provide your name, address, date of birth and citizenship to Elections Canada?

U.S. Person	
Are you or your family members U.S. citizens, U.S. green card holders or U.S. residents? If so, please specify the name of the individual _____	Yes [ ] No [ ]
Did you earn any U.S. income (other than interest, dividends or dispositions of U.S. securities)? This would include income from a U.S. partnership (reported on Schedule K-1), wages or selling U.S. property?	
Yes [ ] No [ ]	

Canadian and Foreign Sources of Income <i>(provide slips, documents or details)</i>	
Employment (T4) [ ]	Sale of capital properties [ ] <i>e.g. stocks/bonds/mutual funds, real estate, personal property, jewelry, works of art, cryptocurrencies, etc. (provide proceeds, actual cost, commission fees, dates of acquisition and disposition)</i>
Pension/retiring allowance (T4A) [ ]	Sale of principal residence [ ] <i>(provide the sales agreement and year of acquisition)</i>
Stock options held in the year [ ]	
Self-employed commission income [ ]	Sale of other real properties [ ] <i>(provide statement of adjustment and lawyer's trust ledger for the acquisition as well as disposition of property, commission fees, renovation costs)</i>
Employment insurance (T4E) [ ]	Sale of residential real estate or an assignment owned for less than 365 days? [ ] <i>(provide details about timing of sale)</i>
CPP/QPP/OAS (T4A(P)/T4A(OAS)) [ ]	Business/professional income/expenses [ ]
RRSP, RRIF, FHSA (T4RSP/T4RIF/T4FHSA) [ ]	Rental income/expenses [ ]
Portfolio/Mutual fund income (T3/T5) [ ]	Support payments received [ ]
Partnerships/tax shelters (T5013/T101) [ ]	Other sources of income (specify): [ ] _____ _____
Dividend income from private corporations (T5) [ ]	
Income from trusts/estate (T3) [ ]	
Spouse's net income <i>(if not prepared by GG)</i> \$ _____	
<b>Note:</b> Through a matching program of tax information slips, the CRA is imposing harsh penalties for unreported income. Please provide us with any late or amended tax slips (i.e. slips received after sending package to GG) to ensure correct amount of income is reported.	

Deductions and Credits <i>(provide receipts, documents or details)</i>	
RRSP/FHSA contributions [ ]	Tuition and Education Credit Certificate (T2202) [ ]
Union/professional membership dues [ ]	Tuition and Education Credit Certificate (TL11A) for tuition paid to international institutions [ ]
Child care expenses [ ]	Interest paid on registered student loans [ ]
Support payments made [ ]	Home accessibility/safety expenses <sup>1</sup> [ ]
Accounting/legal/investment counsel fees [ ]	Medical expenses [ ] <i>e.g. attendant care, medical insurance premium, treatment of fertility. (where applicable, request yearly summary from your pharmacy/practitioner)</i>
Interest paid on investments [ ]	Disability tax credit [ ] <i>(provide details if you or your family member have any disability)</i>
Moving expenses [ ]	Charitable donations [ ] <b>(up to February 28, 2025)</b>
First time home buyer [ ]	
Deductible employment expenses (T2200) [ ] <i>(including home office expenses)</i>	Adoption expenses [ ]
Political/municipal contributions [ ]	Property tax or rent paid for principal residence [ ]
Eligible educator school supply expenses [ ]	Digital news subscription expense paid to qualifying Canadian journalism organization [ ]
Emergency services volunteer /search and rescue volunteer [ ]	Other expenses/deductions/credits (specify) [ ] _____ _____
Multigenerational Home Renovation Tax Credit [ ]	

<b>Foreign Property</b> <i>(If "Yes", please provide details or contact your GG advisor)</i>	
At any time in 2024, did you own or acquire specified foreign property <sup>2</sup> (non-Canadian), with a total cost in excess of CAD\$100,000?	Yes [ ] No [ ]
At any time in the year, did you transfer or loan property or funds to a non-Canadian trust?	Yes [ ] No [ ]
At any time in the year, did you receive funds or property from, or were you indebted to, a non-Canadian trust in which you were a beneficiary?	Yes [ ] No [ ]
Do you own or did you acquire shares of a foreign affiliate in the year? (generally, a foreign affiliate is a non-Canadian corporation in which you have at least a 1% interest and you, together with related persons, have at least a combined 10% interest)	Yes [ ] No [ ]

<b>Other information</b>	
Income tax instalments	\$ _____
Foreign taxes paid	\$ _____
During the year, did you	Yes [ ] No [ ]
- move / change address?	Yes [ ] No [ ]
- sell your principal residence?	Yes [ ] No [ ]
- change your contact information?	Yes [ ] No [ ]
- open a First Home Savings Account (FHSA)?	Yes [ ] No [ ]
- become a resident of Canada?	Yes [ ] No [ ]
- cease to be a resident of Canada?	Yes [ ] No [ ]
Provide additional information in the space below:	

<sup>1</sup> The credit allows an eligible individual to claim renovation work and equipment acquired to help improve the accessibility and safety at home for an individual who is 65 years of age or older, or has a disability. A spouse or close relative living with the qualifying individual is also eligible to claim the credit. Eligible expenses include wheelchair ramp, walk-in bathtub, walk-in shower, support bar.

<sup>2</sup> Specified foreign property includes foreign bank accounts, foreign tangible property (such as a rental property), shares of non-Canadian corporations, and interests in non-Canadian trusts or other non-Canadian entities. Excluded items include property used in an active business, shares or indebtedness of a foreign affiliate, personal-use property (such as a vacation home), interests in foreign trusts that provide retirement benefits, assets held within a RRSP, a RRIF or a RPP and foreign investments held in mutual funds registered in Canada.