SEYMOUR GARDNER & ASSOCIATES
Chartered Professional Accountants

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PERSONAL INCOME TAX CHECKLIST

****Please Fill Out and Return With Your Tax Prep Documents****

Name:
Spouses Name:
Dependents:
Current Home address:
Current Phone Number(s):
Did you have a change in marital status or dependents this year?
Did you sell or purchase a principal residence during 2024?
Are you registered for a MyCRA Account?
Sole Proprietors - Are you registered for GST/HST with the CRA?
-Do you require us to file your GST/HST?

INCOME

Employment and Pensions

- Employment income (T4) and employee profit sharing (T4PS)
- Employment insurance (T4E)
- Pension, retirement, annuities and CERB (T4A)
- Old Age Security (T4A OAS) and CPP (T4A P)
- RRSP income (T4RSP) and RRIF income (T4RIF)

Other

- Scholarship income
- Homebuyer's plan income
- Worker's compensation (T5007) or social assistance
- Spousal support received
- All other foreign and other income

Investments

- Interest, dividends, mutual funds and capital gains (T3, T5 and T5008)
- Limited partnership income (T5013)

Business and Rental

- Statement of rental income and expenses
- Statement of self-employed income and expenses

DEDUCTIONS

- Tuition amounts paid (T2202a)
- Tuition transfer amounts (from spouse, grandchild)
- RRSP contributions
- Investment council fees and accounting fees
- Interest and carrying charges on investments
- Interest paid on student loans
- Disability Tax Credit (CRA approval)
- Charitable donation receipts
- Political contribution receipts
- Employment expenses (T2200 required)
- Spousal support payments
- Childcare expenses

CPA CHARTERED PROFESSIONAL ACCOUNTANTS