



2024 T1 PERSONAL INCOME TAX RETURN CHECKLIST

(One checklist per couple)

Name: _____ Spouse/Partner Name: _____

Address: _____ (Street, City/Town, Province, Postal Code)

2024 Marital Status (Circle One): Married / Common-Law / Widowed / Divorced / Separated / Single

If marital status changed during the year, date of change: _____ (Month / Day) New Status: _____

List any dependents who were born/adopted in 2024: DOB _____ Name _____

Please Provide Your Residency Status (Circle One Below):

Resident / Factual Resident / Non-Resident / Immigrant (Arrived) / Emigrant (Left) / Deemed Resident

Please Provide Your **Spouses** Residency Status (Circle One Below):

Resident / Factual Resident / Non-Resident / Immigrant (Arrived) / Emigrant (Left) / Deemed Resident

Direct Deposit (**NEW**)

If you are not already registered for direct deposit, the Canada Revenue Agency (CRA) is recommending that you sign-up for the CRA Direct Deposit program to ensure that there will be no disruption in the delivery of income tax refunds and the various other programs administered by the CRA, including quarterly GST payments and Canada Carbon Rebate payments. Taxpayers can register for direct deposit using either My Account online, through a Canadian bank or credit union, or by completing a direct deposit enrolment form (paper).

Did you sell your principal residence during the year? Yes No

If Yes, please provide the gross sale proceeds and year of purchase: Proceeds \$ _____ Year: _____

Did you sell any other real estate, including any rental property or recreational property during the year OR change the use of an existing property, i.e., converted your residence to a rental property (**NEW**)? Yes No

If Yes, please provide sale reporting documents from the lawyer and original purchase documents and costs of improvements completed during ownership.

If you answered yes regarding the change of use, please contact our office to discuss. (**NEW**)

Do you live on a farm or in a rural community outside of Rocky View County? Yes No

			IF YES PLEASE PROVIDE:
(NEW) Have you earned income from short-term rentals (Airbnb, VRBO)? New Provincial and/or Municipal regulations could impact the ability to claim deductions against the rental income.	Yes	No	If YES, please provide details including location of the property, income and expenses and any permits issued by the municipality.
Do you have assets outside of Canada, including foreign stocks with a combined cost in excess of \$100,000 CDN (T1135)? This would include ANY crypto currency (NEW)	Yes	No	A listing of all foreign owned assets during the year including value of assets. Please provide the Foreign Property Report from your investment advisor.
Have you spent more than 120 days in United States in any of the last 3 years?	Yes	No	Please provide the number of days per calendar year: 2024 _____ 2023 _____ 2022 _____
If you have spent more than 120 days in the United States in the last 3 years, would you like GH&A to prepare IRS form 8840 if required?	Yes	No	
Do you and your spouse authorize CRA to provide information to Elections Canada?	Yes	No	

INCOME			IF YES PLEASE PROVIDE:
Employment income	Yes	No	T4 slips issued by employer
Pension/annuity income/commission	Yes	No	T4A / T4A(P) / T4A(OAS) slips
Foreign pension income	Yes	No	Country, type (company/government), currency
RRSP/RRIF income	Yes	No	T4RSP / T4RIF slips
Interest/dividend/investment income/mutual fund income	Yes	No	T3 / T5 / T5013 slips, details of other investment income
Capital gains/losses from sale of stocks, mutual funds, bonds, cryptocurrency, real estate, etc.	Yes	No	1. Realized Gain/Loss Report 2. T5008
Can we contact your investment advisor?	Yes	No	Name: _____ Phone #: _____ Email: _____
Self-employment income (including rental, business, farming)	Yes	No	Details of income and expenses for year. Also provide invoices for equipment purchases and/or dispositions
Are you providing electronic data for the above noted self-employment income?	Yes	No	Program Name / Version: _____ Username: _____ Password: _____
Do you have a personal business GST return that you need GH&A to file?	Yes	No	Provide GST return information including CRA access code (if available).

OTHER INCOME				IF YES PLEASE PROVIDE:
Other income	Yes	No		Details or slips (Workers Compensation T5007, Employment Insurance T4E, Spousal Support Payments , etc.)
Sale of real estate	Yes	No		Sale reporting documents from the lawyer and original purchase documents.

DEDUCTIONS AND CREDITS				IF YES PLEASE PROVIDE:
RRSP contributions	Yes	No		Tax receipts – may include first 60 days of current year (Contributions to March 3, 2025)
Home Buyers Plan (HBP) or Lifelong Learning Plan (LLP)	Yes	No		Amount of any HBP or LLP repayment and statement from CRA
FHSA (First Home Savings Account) contributions	Yes	No		T4FHSA
Union or professional dues	Yes	No		Tax receipts (if not listed on T4)
Childcare/summer camp for your children	Yes	No		Official receipts
First-time home buyer tax credit	Yes	No		Date of when home was purchased
Moving expenses	Yes	No		Details – must move at least 40km closer to work
Investment income expenses	Yes	No		Interest expenses, management fees, etc.
Spousal support payments made	Yes	No		Details of payments made
Home office/employment expenses	Yes	No		Details of employment expenses (You Must Provide Receipts) – please also include signed T2200 received from your employer
Student loan interest	Yes	No		Tax receipt – Canada Apprentice Loans are now eligible
Tuition fees for self	Yes	No		T2202/T2202A
Tuition fees of dependent who wishes to transfer	Yes	No		T2202/T2202A signed by student + copy of student's tax return if not prepared by GH&A
Medical expenses (including prescriptions, dental, health, vision, insurance premiums)	Yes	No		Receipts (You Must Provide Receipts) – contact your pharmacy or insurance provider for a summary of your prescriptions for the year. As well, please provide a summary of any travel over 40 km one-way for medical purposes, including dates and kilometres driven
Attendant care or nursing home costs	Yes	No		Provide receipts and/or annual statement
Disability Tax Credit	Yes	No		If you feel you are eligible, have your doctor complete T2201 from and send to CRA for approval
Canada Caregiver Credit (care provided for an adult dependent/parent)	Yes	No		If you provide care for an infirm dependent either in your home or not, provide certified letter from doctor and net income of dependent

Charitable donations INCLUDING DONATIONS MADE IN THE FIRST 59 DAYS OF 2025 (NEW)	Yes	No	Tax receipts (You Must Provide Receipts)
Political donations (Federal and Provincial)	Yes	No	Tax receipts (You Must Provide Receipts)
School supplies (Teachers Only)	Yes	No	Receipts for supplies (You Must Provide Receipts)
Volunteer firefighter or search and rescue	Yes	No	Letter of hours volunteered (You Must Provide the Letter)
COVID related support repayments (CRB, CRSB, CRCB, and provincial supports)	Yes	No	Please advise if you were required to repay COVID related support in 2024 and provide the T4A slip issued by the government agency (NEW)
Digital News Subscription	Yes	No	Receipts from news agency (You Must Provide Receipts)
(NEW) Have you incurred expenses to renovate your house to improve accessibility for a disabled person in your household, including seniors?	Yes	No	Receipts from contractors and other providers (You Must Provide Receipts)

PLEASE VISIT THE RESOURCES PAGE ON OUR WEBSITE FOR ADDITIONAL INFORMATION AND DOCUMENTS TO ASSIST WITH THE PREPARATION OF YOUR 2024 PERSONAL INCOME TAX RETURN

<https://gh-a.com/resources/personal-tax-return-information-checklists.html>

IMPORTANT: Gregory, Harriman & Associates LLP is authorized to retain the current personal and/or financial information and historical personal and/or financial information for as long as it may be required by legislation, i.e., the Income Tax Act, and/or as may be required to document future support program applications and/or future external financing applications and doing so thereafter for a reasonable period of time. I acknowledge my right to access the applicable personal and financial information collected by Gregory, Harriman & Associates LLP by contacting the Privacy Officer.

Name: _____

Spouse: _____

Signature: _____

Signature: _____

How would you like to sign your 2024 Personal Tax Return(s)?		
<input type="checkbox"/> Adobe Sign	EMAIL: _____	<input type="checkbox"/> Sign at Office
	EMAIL: _____	<input type="checkbox"/> Express Post (\$40.00 fee)

To ensure the security of sensitive financial information being emailed to our office, we recommend using our secure client portal (E-Courier) or password protecting attachments. Please contact mailbox@gh-a.com if you would like to set up an E-Courier account.

IMPORTANT: Personal Income Tax Returns will NOT be filed with CRA without payment and required signatures.