

# Hollinger Business Services

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## Personal Tax Checklist - What to Bring

Unsure of what to bring to prepare your 2024 T1 Personal Tax Return? We have prepared a checklist of forms and receipts to help.

### Income

- ☐ Employment income (T4)
- ☐ Employment insurance benefits (T4E)
- ☐ Other, Pension or Partnership income (T4A, T4PS, T5013)
- ☐ Old Age Security and CPP benefits (T4A-OAS, T4A-P)
- ☐ Social assistance or Workers' compensation (T5007)
- ☐ RRSP, RIF or FHSA income (T4RSP, T4RIF, T4FHSA)
- ☐ Interest, dividends, mutual funds (T3, T5, T5008)
- ☐ Advanced Canada workers benefit (RC210)
- ☐ Foreign pension
- ☐ Spousal support payments received
- ☐ Tips
- ☐ All other information slips or income not reported on a slip

### Business / Self-Employed

- ☐ Completed business summary form from our website

### Rental Property

- ☐ Completed rental summary form from our website

### Other Information

- ☐ Sale of principal residence
- ☐ Sale or deemed sale of stocks, bonds, or real estate
- ☐ Change of address
- ☐ New dependants (name, relation, birth date)
- ☐ Tax installments paid

### Receipts

- ☐ Rent
- ☐ Property Tax
- ☐ Childcare and camps (exclude sports unless camp)
- ☐ Donations
- ☐ Political contributions
- ☐ Investment Mgmt Fees and Loan Interest (open money accounts)
- ☐ Medical and Prescription Summaries from Practitioner/Pharmacy
- ☐ Insurance Premium and Claim Summaries (summarize out-of-pocket costs)
- ☐ Personal attendant/nursing home care
- ☐ RRSP Contributions
- ☐ Tuition T2202 (get online from institution's portal)
- ☐ Adoption expenses
- ☐ Bus Passes (seniors only)
- ☐ Canadian Digital News Subscriptions
- ☐ Exams for professional certification or professional insurance
- ☐ FHSA First Home Savings Account Contributions
- ☐ Home accessibility expense list (CRA form available)
- ☐ Moving expenses (CRA form available)
- ☐ Multi-Generational Home Renovation expense list (CRA form available)
- ☐ Northern resident deduction (CRA form available)
- ☐ Student Government Loan Interest
- ☐ Support payments
- ☐ Teachers' school supplies
- ☐ Tool expense list
- ☐ Union Dues not included on your T4 slip

### Employment Expenses

- ☐ Signed T2200 from employer
- ☐ Completed Employment expenses form from our website
- ☐ Tool expense list
- ☐ Teachers' school supplies
- ☐ Trucker Meals & Lodging TL2

**Note: Working from home flat rate per day is NO longer available**

**Excel summaries are available to download from our website:  
Business, Rental Property, Employment Expenses**

[www.HollingerBiz.com](http://www.HollingerBiz.com)