

226-224-0727

432 WATERLOO STREET LONDON



FILE ONLINE @

WWW.SIMPLETAXSOLUTIONS.CA

2024 TAX CHECKLIST

PERSONAL INFO

NEW CLIENTS - FILL OUT CLIENT INFORMATION FORM & SUBMIT WITH TAX FORMS

RETURNING CLIENTS - PROVIDE DETAILS ON ANY CHANGES TO YOUR PERSONAL INFORMATION

(SIN - ADDRESS - MARITAL STATUS - DEPENDANTS - DIRECT DEPOSIT DETAILS - DISABILITY TAX CREDIT - ECT)

INCOME

- T4 FORM FROM EACH EMPLOYER IN 2024 (EMPLOYMENT INCOME)
- T4A (PENSION, ANNUITY AND SIMILAR INCOME, OAS, CPP, SCHOLARSHIPS, BURSARIES AND STUDENT GRANTS)
- T4E (E.I BENEFITS - MATERNITY BENEFITS)
- T3/T5/T5008 (INTEREST INCOME, DIVIDEND INCOME, & DISPOSITIONS OF SECURITIES)
- INVESTMENT REPORTS & CRYPTO INVESTMENT REPORTS (NON-REGISTERED TRADING SUMMARIES)
- SUMMARY OF RENTAL PROPERTIES (INCOME & EXPENSES - PER PROPERTY)
- SELF EMPLOYMENT INCOME (REVENUE/ EXPENSES - GST/HST INFORMATION)
- OTHER INCOME NOT REPORTED ON A SLIPS

RECEIPTS

- T2200 (EMPLOYMENT EXPENSES & WORK FROM HOME WRITE OFFS. MUST OBTAIN THIS FORM FROM EMPLOYER & HAVE RECEIPTS FOR ALL CLAIMS)
- T2202 (TUITION FORMS)
- RRSPP CONTRIBUTION RECEIPTS & FTHB CONTRIBUTIONS (FIRST TIME HOME BUYER SAVINGS ACCOUNT)
- MEDICAL RECEIPTS AND RECEIPTS FOR HOME ACCESSIBILITY TAX CREDIT
- UNION DUES/PROFESSIONAL DUES/ EXAMS FOR PROFESSIONAL CERTIFICATIONS
- CHARITABLE DONATIONS
- INTEREST EXPENSE (AMOUNT PAID ON STUDENT LOANS - INVESTMENT OR BUSINESS LOANS)
- MOVING EXPENSES (IF MOVED MORE THAN 40KM WITHIN CANADA FOR SCHOOL OR WORK)
- TOOL EXPENSES (TRADE WORKERS)
- CHILDHOOD EDUCATOR SCHOOL SUPPLY RECEIPTS (TEACHERS ONLY)
- POLITICAL CONTRIBUTIONS
- CHILD CARE/CAMP/BABYSITTER EXPENSES (DOCUMENTATION NEEDED)
- SUPPORT PAYMENTS MADE OR RECEIVED
- DIGITAL NEWS PRESCRIPTIONS

OTHER INFO

- SALE OF PRINCIPLE RESIDENCE (PRINCIPLE RESIDENCE EXEMPTION)
- FIRST HOME PURCHASE (FIRST TIME HOME BUYERS \$10,000 TAX CREDIT)
- TAX INSTALMENT PAYMENTS (PRE-PAID TAX LIABILITY)

2024 TAX INFO
IM READY TO FILE!

CALL 226-224-0727

** IF YOU ARE UNABLE TO OBTAIN ANY OF THE FOLLOWING FORMS OR HAVE ANY QUESTIONS, PLEASE LET US KNOW