

Canadian T1 Tax Return

PREPARATION CHECKLIST

| 1. What is your full name? | 11. If you currently receive paper copies of your Notice of Assessment, are |
|----------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|
| FIRST NAME | you interested in receiving your Notice of Assessment electronically only? |
| LAST NAME | Note: This would require you to register for "My Account" with CRA. |
| | ☐ YES |
| 2. If you are completing this survey as part of a couple, please provide | □NO |
| their full name as well. | |
| FIRST NAME | 12. If yes to the previous question, please provide the email address you |
| LAST NAME | would like CRA to use here: |
| | EMAIL |
| 3. Would you like to sign your tax documents electronically? | |
| YES | 13. Are you a Canadian resident for tax purposes? |
| _ NO | YES |
| | □NO |
| 4. What is your email address? | |
| EMAIL | 14. Did you or your spouse or common-law partner add a child (children) |
| | to your family in 2024? |
| 5. If this survey is being completed on behalf of a couple, please include | YES |
| your partner's email address. | □ NO |
| EMAIL | |
| | 15. Do you have any children or dependents under the age of 18 in 2024? |
| 6. What is your telephone number? | □YES |
| COUNTRY CODE | □ NO |
| PHONE NUMBER +1 | |
| EXT. | 16. Are you providing care for someone who meets any of the following |
| | descriptions? |
| 7. What is your current residential address? | ☐ Spouse |
| STREET ADDRESS | ☐ Your parent, grandparent, aunt, uncle, niece, or nephew |
| CITY PROVINCE | Your child, grandchild, brother or sister under 18 years of age |
| COUNTRY | ☐ Your child, grandchild, brother, or sister 18 years of age or over with an impairment |
| | in physical or mental functions |
| 8. Did your residential address change in 2024? | □ N/A |
| YES | |
| □ NO | 17. For Nova Scotia residents, have you paid fees towards sports or arts |
| | activities for children under the age of 19? |
| 9. Do you authorize the Canada Revenue Agency to give your name, | ☐ YES |
| address, date of birth, and citizenship to Elections Canada to update | □ NO |
| the National Register of Electors? | □ N/A |
| YES | |
| □ NO | 18. Did you own specified foreign property at any time in 2024 with a total |
| | cost of more than CAN\$100,000? |
| 10. If you live in Ontario, do you authorize the CRA to share your name | YES |
| and email address to Ontario Health for the purpose of being contacted | □ NO |
| by email about organ and tissue donation? | |
| YES | 19. Did you earn income from a payer in the United States in 2024 or any |
| □ YES | other foreign country? |
| _ | |
| □ N/A | YES |
| | □NO |



| 20. Did you earn employment income in 2024? | 32. Did you have any RRSP or FHSA (First Home Saving Account) |
|-------------------------------------------------------------------------|-------------------------------------------------------------------------------|
| □YES | contributions? |
| □NO | □YES |
| | □NO |
| 21. Did you earn self-employment or business income in 2024? | |
| ☐ YES | 33. Did you have any other deductions or credits to claim? |
| □NO | □YES |
| | □ NO |
| 22. Did you receive any income from investments (e.g. interest, | |
| dividends)? | 34. Did you sell your principal residence in 2024? |
| YES | □YES |
| □NO | □NO |
| | |
| 23. Did you receive income from any other source? | 35. Did you relocate for employment purposes in 2024? |
| ☐ YES | ☐ YES |
| □NO | □NO |
| IF "YES", PLEASE SPECIFY | |
| | 36. Did you incur any expenses in 2024 to improve the safety of your |
| 24. Did you buy a home in 2024? | home for someone over the age of 65 or someone eligible for the |
| YES | disability tax credit? |
| □NO | YES |
| | □NO |
| 25. If a resident of BC, did you rent in 2024? | |
| ☐ YES | 37. Did you convert all or part of a home from a rental property into your |
| □NO | principal residence, or from your principal residence into a rental property |
| | in 2024? |
| 26. Did you have business use of a vehicle in 2024? | □YES |
| YES | □NO |
| □NO | |
| | 38. We've included a document checklist for your convenience. |
| 27. Did you dispose of capital property in 2024 outside of your Verecan | Notice of Assessment (if we are filing your return for the first time) |
| Managed Account? | Previous Year Tax Return (if we are filing your return for the first time) |
| ☐ YES | Current Year Installment Summary |
| □NO | ☐ All Issued T4 Slips |
| _ | RSP Contribution Receipts |
| 28. Did you make any charitable donations? | Employment Expenses (T2200) |
| □YES | Professional & Union Dues Receipts (If not included in T4) |
| □NO | ☐ Interest Charges on Investment Loans (Statement of Interest Charges) |
| | Investment Management Fees (Annual Account Statement) |
| 29. Did you incur any medical expenses? | Child Care Expenses (Receipts) |
| TYES | Support Payments (Record of Payments Made) |
| □ NO | Tuition/Student Loan Interest (Receipts, T2202A) |
| — ···- | Medical (Receipts, Travel Records, Premiums you paid for private health plan) |
| 30. Did you have any tuition or education amounts to claim? | Digital News Subscription (Receipts) |
| YES | Adoption Expenses (Receipts) |
| □ NO | Charitable Donatations (Receipts) |
| | Moving Expenses (Receipts) |
| 31. Did you have any childcare expenses? | |
| TES | ☐ Volunteer Firefighter/Search & Rescue (Support Letter) |
| | |

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