

Personal Information Update		Y/N
Did you change address, marital status or name? If yes, please provide details		
Did you have any new dependant? If yes, Please click Appendix 1 to fill out information.		
Did you sell any real estate during the year? If yes, Please click Appendix 3 Part A to fill out information.		
Did you change the use of any real estate property during the year? I.e. a principal residence into a rental property or vice versa? If yes, Please click Appendix 3 Part C to fill out information.		
Income: did you earn the following income		
Please provide all information slips: T3, T4, T4A, T4A(OAS), T4A(P), T4E, T4PS, T4RIF, T4RSP, T5, T5003, T5007, T5008, T5013, T5018, T4FHSA(NEW!)		
Rental income including long-term rental and Airbnb/VRBO. Please click Appendix 5 to fill out information.		
Business income: including all sole-proprietorship business and shared economy (eg. Uber) or internet based payments(eg.Youtuber, etc). Please click Appendix 6 to fill out information.		
Capital gain(loss) from sale of real estate: sold a real estate property that is not your principal residence in 2023? Please click Appendix 3 Part B to fill out information.		
Capital gain(loss) from sale of non-registered investments or cryptocurrency: please provide trading summary from your broker and T5008 slips		
Other income not receiving T-slips: foreign pensions, spousal or child support, scholarships, fellowship and bursaries, tips or gratuities		
Deduction and tax credits: did you have the following deductions and credits?		
RRSP contributions: including the contribution made during the first 60 days of 2024. NEW: Multi-Generational Home Reno Credits: eligible renovation costs that is used to build a second unit in an existing home for related seniors who are over 65-years-old or with disability. The unit must have a private entrance, a kitchen, a bedroom and a bathroom		
Employment Expense: T2200 needs to be signed by your employer, please provide receipts.		
Professional or union dues: please provide receipts		
Moving: moved 40KM closer to your work or school and didn't get reimbursed from your employer. Please click Appendix 8 to fill out information.		
Interest and advisory fee on investment: paid related to non-registered investment accounts. Please provide dollar amount.		
Charitable donations: to registered charities and political contribution. Please provide receipts.		
Childcare expenses: including day camps and noon supervision: please provide receipts		
Tuition fee: for both full-time and part-time courses, please provide T2202 form		
Medical expenses: including personal health plan premiums paid for you, your spouse and any dependent persons. Please provide receipts		
Other Payments: Alimony and spousal support		

Student loan Interest: Only qualifying student loan is eligible. Please provide dollar amount.		
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Eligible School Supplies: only for teacher and please provide receipts for up to \$1,000.		
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