

ROLFE BENSON LLP - 2024 PERSONAL INCOME TAX CHECKLIST

**PLEASE COMPLETE THIS FORM AND RETURN TO US
ALONG WITH YOUR TAX SLIPS/INFORMATION**

IMPORTANT:

- (1) To help reduce the use and waste of paper, a copy of your tax return will be provided in electronic format.
If you would like a paper copy select YES. Yes
- (2) Please provide a copy of all family members' 2023 NOTICE OF ASSESSMENT/REASSESSMENT and a copy of the CRA statement showing the instalments paid on account for the 2024 year, as applicable.

PERSONAL INFORMATION (Questions 1 to 5 - Complete for every family member)

Name	Email address	(1)	(2)		(3)		(4)		(5)		
		e-Sign Return	Canadian Citizen		Elections Canada		Foreign Property		Foreign Trust		
		Yes	Yes	No	Yes	No	Yes	No	Yes	No	
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Questions (tick boxes above):

- (1) Would you like to receive your tax return for signing with e-Signature software? If yes, please provide all family members' email addresses.
- (2) Are you a Canadian Citizen?
- (3) As a Canadian citizen, do you authorize the Canada Revenue Agency to give your name, address, date of birth and citizenship to Elections Canada to update the National Register of Electors, or the Register of Future Electors (if aged 14 to 17)?
- (4) Did you own or hold foreign property at any time in 2024 where the total cost at any time was more than CAN \$100,000? (i.e. foreign bank accounts, shares in non-resident corporations, cryptocurrency, debt owed to you by a non-resident, interest in non-resident trust, intangible property rights, real estate outside of Canada)
- (5) Did you ever loan or transfer funds or property to a non-resident trust or did you ever receive funds or property from, or have been indebted to, a non-resident in which you had or will have absolute or condition rights as a beneficiary, either directly or indirectly?

Please note - there are substantial penalties for failing to report information from question (4) and (5) on your tax return.

- (6) Do you authorize CRA to provide your name, mailing address and email address to the applicable province/territory to contact you about organ and tissue donation? Yes No
- (7) Are you a U.S. person (U.S. citizen or Green Card holder)? Yes No
- (8) Did you sell real estate in 2024? (If yes, please provide details) Yes No
 If yes, did you own it for less than 365 consecutive days before disposition? Yes No
 If owned less than 365 days, what is the reason for the disposition? _____
- (9) Did you stop living in your principal residence and rent it out in 2024? Yes No
- (10) Please ensure we have the full names and dates of birth for all children, dependents, and SINs if applicable:

PRIMARY CONTACT INFORMATION (Have you moved?)

Street Address _____ Home Phone _____
 City _____ Province _____ Mobile Phone _____

I/We would like to register for the secure transfer of confidential, digital information via Rolfe Benson Portal. Yes No

EMPLOYMENT INCOME		
Employment income and benefits	T4	
Commission income	T4A or T4A	
Payments from DPSP or profit sharing plan	T4A/T4PS	
Severance pay or retirement allowance	T4A	
Tips, casual wages or part-time salary	T4, T4A, pay slip or summary showing amount received	

RETIREMENT INCOME		
Old Age Security	T4A(OAS)	
Canada Pension Plan /Disability benefits	T4A(P)	
Other pension or superannuation	T4A	
RRSP annuity income	T4RSP	
RRIF annuity income	T4RIF	
Other annuity income	T4A	
Foreign pension income	Foreign reporting slip / withholding tax details	

OTHER INCOME		
Income from a trust/mutual fund	T3 details of income and cost base adjustments	
Interest, dividend, royalty and other	T5	
fees for service	T4A	
EI benefits	T4E	
Canada Savings Bond/other bond interest	T600/other	
Working income tax benefit	RC210	
Worker's comp/Social Assistance	T5007	
Foreign income	Foreign jurisdiction reporting slip / withholding tax details	
Partnership income	T5013	
Rental income/loss	rental income and expenses or Form T776 Any non-compliant short-term rental expense	
Capital gains/losses (1 January - 24 June)	Cost base, proceeds of sale (T3/T5/T5008, broker gain/loss report)	
Capital gains/losses (post 24 June 2024)		
Real estate disposition	Property address, year of acquisition, date of disposition, proceeds of disposition, statement of adjustment, cost base	
Alimony and support payments	Agreement details and amounts received	
Cryptocurrency transactions (i.e. Bitcoin)	Purchase/disposition details	

SELF EMPLOYMENT INCOME		
Business, professional or commission income	Details of income and expenses or Form T2125; T4A if self-employed commission	
GST/HST or QST registration	GST/HST # if registered	
Vehicle-related expenses	Details, business km, total km during the year	
Home office expenses	Details, SF of home office and total home SF	
CEBA loan (if not repaid by deadline e.g., 18 January 2024)	Loan balance outstanding	
Farming	Details of all income and expenses incl. farm support payments (e.g. AgriStability or AgriInvest)	
Joint venture	Joint venture statements	

DEDUCTIONS		
FHSA	T4FHSA	
RRSP	Contribution receipts	
RRSP rollovers or withdrawals	Details - including home buyers plan information	
Annual union, professional or like dues (do not include if reimbursed)	T4 or receipts	
Childcare expenses	Details of payment/SINs where applicable	
Attendant care expenses	Receipts & details	
Employment expenses	T2200, details of expenses (i.e. auto, travel, entertainment)	
CERB, CESB, CRB, CRSB, CRCB repayments	T4A slip	
Carrying charges and interest expense	Details, purpose of loan & interest paid.	
Clergy residence deduction	T1223	
Alimony and maintenance paid	Agreement details & amounts paid	
Business investment losses	Details of investment in private corporation	
Moving expenses - selling and operating old residence	Details of move and all expenses	
Tax shelters	Bring or send details	
Other deductions	Bring or send details	

TAX CREDITS		
Spousal credit	Net income for spouse	
Disability credit (if 1st year of claim)	T2201	
Home accessibility tax credit - Costs to renovate your home to enhance mobility or reduce harm to a person eligible for the disability credit or 65 years or older	Provide expenses (i.e. wheelchair ramps, walk-in bathtubs, grab bars). (max \$20,000)	
Tuition fees	T2202 or TL11A for schools outside Canada	
Medical expenses	Receipts (prescriptions, dental, glasses etc).	
Donations	Official receipts	
Federal / Provincial Political contributions	Official receipts	
Interest on student loans	Statement of interest	
Venture capital credit	T5006, provide details	
Home buyer - 1st time buyer	Provide details	
Adoption expenses - each child under 18 years adopted in 2024.	Receipts from adoption organization	
Early educator school supply tax credit - Teacher or early childhood educator paid for eligible supplies used in the school or regulated child care facility.	Provide expenses (i.e. paper, flashcards, art supplies, stationery, games, puzzles, books). (max \$1,000)	
BC renter's tax credit (if net income <\$83k and rented at least 6 months) (max \$400)	Rental address, rent paid, # of months, landlord's name	
Multigenerational Home Renovation Tax Credit (if renovation completed in 2024)	2024) for renovation expenses. (max \$50,000)	

FOREIGN REPORTING		
Property held in an account with a Canadian Securities dealer	For each investment, country, FMV at each month end, income and gain/loss realized	
Foreign assets including cash, real estate, investments in foreign companies (including private foreign companies), Cryptocurrency (i.e. Bitcoin).	For each property max cost in the year, cost at year end, income and gain/loss realized	
Foreign companies controlled by you and/or 4 other Canadian residents	cost base, # of employees for the year, financial statements (incl. notes) of the foreign affiliate	
Transactions with foreign trusts	Provide details	
Foreign tax paid (credit)	Copy of foreign tax return and tax assessment	

Comments / list of items to be sent at later date:

Direct deposit information (Canadian financial institutions only) - please call with information