

**2024 TAX RETURN CHECKLIST**

website: [www.lepore-ca.com](http://www.lepore-ca.com)

email: [support@lepore-ca.com](mailto:support@lepore-ca.com)

**Please include the following information along with this completed checklist:**

- Your 2024 tax information slips (T4, T5, T4A, etc.).
- A copy of your 2023 Notice of Assessment. **WE NEED THIS FOR ANY PERTINENT CARRY FORWARD INFORMATION (ie CAPITAL GAINS/LOSSES/RRSP LIMITS etc.).**
- Please provide a copy of your previous tax return if this is the first year we are preparing your return. We have included worksheets with the checklist to assist you if you sold stocks, mutual funds or real estate in 2024 or if you had a rental property, business income or employment expenses in 2024 (see the last 2 pages).

IT IS OUR POLICY TO ADVISE YOU WHEN YOUR RETURN HAS BEEN COMPLETED. WE ARE UNABLE TO GIVE OUT ANY INFORMATION REGARDING REFUNDS/BALANCES OWING OVER THE PHONE, DUE TO PRIVACY RESTRICTIONS. PLEASE ENSURE THAT YOUR RETURN IS PICKED UP BEFORE APRIL 30TH.



**HAS ANYTHING CHANGED in 2024?**

1. Your Name: \_\_\_\_\_ SIN#: \_\_\_\_\_ Birthdate: \_\_\_\_\_
2. Your Spouse: \_\_\_\_\_ SIN#: \_\_\_\_\_ Birthdate: \_\_\_\_\_  
dd/mm/yy
3. Address:  
Street: \_\_\_\_\_ City: \_\_\_\_\_ Postal Code: \_\_\_\_\_
4. Your home phone #: \_\_\_\_\_ E-mail address: \_\_\_\_\_
5. Your work phone #: \_\_\_\_\_

6. Your Financial Planner and Institution \_\_\_\_\_
7. Your Marital Status:  Married  Widowed  Separated  Common-law  Divorced  Single  
If marital status changed in the year, date of change: \_\_\_\_\_

8. Are we preparing a 2024 tax return for your spouse?  Yes  No

9. **If we are NOT PREPARING a return for your spouse, please provide the following:**  
Net income figure from line 23600 on page 2 of his or her 2024 tax return: \_\_\_\_\_ Spouse's net income \$ \_\_\_\_\_

10. **List any dependents as of December 31, 2024:**

Name & SIN #	Relationship & residing with you?	2024 income of dependent (if we are not preparing the return)	Birthdate	Are we preparing the return?	
_____	_____	\$ _____	_____	<input type="checkbox"/> yes	<input type="checkbox"/> no
_____	_____	\$ _____	_____	<input type="checkbox"/> yes	<input type="checkbox"/> no
_____	_____	\$ _____	_____	<input type="checkbox"/> yes	<input type="checkbox"/> no

dd mm yyyy

11. Did you own/hold foreign property with a cost of more than \$100,000?  Yes (attach details)  No
12. Are you a Canadian citizen?  Yes  No
13. Do you authorize CRA to provide information about you to Elections Canada?  Yes  No
14. Did you receive income from U.S. sources in 2024?  Yes  No  
- In which country were you a resident in 2024?  Canada  U.S.  Unsure

15. How would you like to receive your tax return?  
 Pick up in office  
 Receive via emailed secure link  
 Receive Via Canada Post (charges may apply)  
 Receive via Courier (charges may apply)





### Your 2024 Income

Check if you have any of the following income items:

Item	Slips to Bring
<input type="checkbox"/> Employment income	T4
<input type="checkbox"/> Taxable disability income	T4A
<input type="checkbox"/> Profit sharing income	T4PS
<input type="checkbox"/> Commission income	T4 or T4A
<input type="checkbox"/> Old Age Security income	T4A(OAS)
<input type="checkbox"/> Canada Pension Plan income	T4AP
<input type="checkbox"/> Other pension/annuity income	T4A
<input type="checkbox"/> RRSP income	T4RSP
<input type="checkbox"/> RRIF income	T4RIF
<input type="checkbox"/> Withdrawals from RRSP	T4RSP
<input type="checkbox"/> EI Benefits	T4E
<input type="checkbox"/> Worker's Compensation (WSIB)	T5007
<input type="checkbox"/> Social assistance payments	T5007
<input type="checkbox"/> Dividend income	T3s and T5s
<input type="checkbox"/> Interest income	T5s
<input type="checkbox"/> Limited partnership income	T5013
<input type="checkbox"/> Rental property income	See next page
<input type="checkbox"/> Sale of real estate	See next page
<input type="checkbox"/> Sale of non-RRSP stocks	See next page
<input type="checkbox"/> Sale of non-RRSP mutual funds	See next page
<input type="checkbox"/> Self-employed income	See back page
<input type="checkbox"/> Alimony income	\$ _____
<input type="checkbox"/> Other income:	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

*If additional slips are received after filing, there will be a service charge to adjust the return.*

### Your 2024 Deductions/Credits

Check if you have any of the following: Please include receipts.\*



Item	Amount
<input type="checkbox"/> Charitable donations *(only official donations)	\$ _____
<input type="checkbox"/> Political party contributions	\$ _____
<input type="checkbox"/> Labour-sponsored fund contributions	\$ _____
<input type="checkbox"/> RRSP & FHSA contributions	\$ _____
<input type="checkbox"/> Moving expenses (in some circumstances)	\$ _____
<input type="checkbox"/> Tuition fees for yourself	\$ _____
<input type="checkbox"/> Children's / spouse's tuition fees (post secondary tuition only)	\$ _____

Please note amount and ensure that you have the receipts to support the following items: (If unsure, attach receipts)

<input type="checkbox"/> Employment expenses	see back page
<input type="checkbox"/> Alimony payments made	\$ _____
<input type="checkbox"/> Disability amount	\$ _____
<input type="checkbox"/> Medical expenses (out of pocket amounts only)** <small>(include any medical insurance paid by you)</small>	\$ _____
<input type="checkbox"/> Rent paid	\$ _____
<input type="checkbox"/> Property taxes paid	\$ _____
<input type="checkbox"/> Digital News Subscription	\$ _____
<input type="checkbox"/> Legal fees for investment loan	\$ _____
<input type="checkbox"/> Investment loan interest	\$ _____
_____ (Bank/Trust Company)	\$ _____
<input type="checkbox"/> Quarterly tax instalments paid to the government (these are not found on any T-slips)	\$ _____
<input type="checkbox"/> Union dues, professional fees	\$ _____
<input type="checkbox"/> Child care expenses	\$ _____
<input type="checkbox"/> Other	\$ _____

\* If there is a discrepancy between the figures above and the slips provided, we will use the total of the slips provided.

\*\* Do not include any medical amounts paid by insurance companies or paid by the Ontario Government etc, only amounts paid by you out of pocket (and not reimbursed by anyone).

### Other information you would like to tell us about.



\*\*\* DID YOU SELL YOUR PRINCIPAL RESIDENCE IN 2024? YES? / NO? (Now required)

if YES Address of property sold: \_\_\_\_\_

Year purchased: \_\_\_\_\_

Proceeds on the sale of the property: \_\_\_\_\_

***If you are not sure we'll need it, bring it along!***

## Rental Property Income & Expenses



Address \_\_\_\_\_

Joint owner \_\_\_\_\_

Jt. Ownership % \_\_\_\_\_

Income (rent collected) \$ \_\_\_\_\_

### Expenses

Advertising \_\_\_\_\_ \$ \_\_\_\_\_

Insurance \_\_\_\_\_ \$ \_\_\_\_\_

Mortgage Interest \_\_\_\_\_ \$ \_\_\_\_\_

Repairs \_\_\_\_\_ \$ \_\_\_\_\_

Property Taxes \_\_\_\_\_ \$ \_\_\_\_\_

Salaries \_\_\_\_\_ \$ \_\_\_\_\_

Utilities \_\_\_\_\_ \$ \_\_\_\_\_

Condo Fees \_\_\_\_\_ \$ \_\_\_\_\_

Other Expenses \_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

Major renovations & purchases (ie. Appliances) \_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

*If the property was purchased in the year, please provide the details.*

## Sale of Real Estate (excluding personal residence)



Address \_\_\_\_\_

Date Sold \_\_\_\_\_

Joint owner \_\_\_\_\_

Jt. Ownership % \_\_\_\_\_

Date Purchased \_\_\_\_\_

Purchase price \_\_\_\_\_ \$ \_\_\_\_\_

Legal costs on purchase \_\_\_\_\_ \$ \_\_\_\_\_

Additions / major improvements: \_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

Sale Price \_\_\_\_\_ \$ \_\_\_\_\_

Legal costs on sale \_\_\_\_\_ \$ \_\_\_\_\_

Commissions paid on sale \_\_\_\_\_ \$ \_\_\_\_\_

Other selling expenses \_\_\_\_\_ \$ \_\_\_\_\_

## Sale of Non-RRSP Stock (please provide broker's receipts for both the purchase and the sale)

Name of Stock	Date Sold (dd/mm/yy)	Number of Shares	Sale* Price	Purchase* Price	Commissions Paid

\* Price per share

## Sale or Transfer of Non-RRSP Mutual Funds (including systematic withdrawal programs)

Please provide the December 31, 2024 year end statements for all of your non-RRSP mutual funds. These statements were sent to you by the mutual fund companies in early 2024. The statements show all transactions for 2024, including any sale, redemption or transfer of your shares in the mutual fund during the year.

List all of your mutual funds that had shares sold or transferred during 2024.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



## Self-Employed Income & Expenses

Name of Business \_\_\_\_\_



Type of Business and address if different from home \_\_\_\_\_

Joint Owner and % \_\_\_\_\_

**Income** \$ \_\_\_\_\_

**Expenses**

Advertising \$ \_\_\_\_\_

Licenses, dues, fees \$ \_\_\_\_\_

Insurance \$ \_\_\_\_\_

Interest/bank charges \$ \_\_\_\_\_

Meals/entertainment \$ \_\_\_\_\_

Office supplies \$ \_\_\_\_\_

Legal & accounting \$ \_\_\_\_\_

Rent \$ \_\_\_\_\_

Salaries \$ \_\_\_\_\_

Telephone \$ \_\_\_\_\_

Other expenses \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

Equipment/furniture purchases (if you need more space, attach list)

\_\_\_\_\_ \$ \_\_\_\_\_

Registered for HST?  YES  NO

If yes, do the above figures include HST? \_\_\_\_\_

GST/HST instalments paid \$ \_\_\_\_\_

Automobile SEE ACROSS

Home office SEE BELOW

## Employment Expenses

Please ensure that you have a **signed T2200 (Declaration of Employment Conditions)** available should you be asked by the government to substantiate this claim. Please provide us with a copy of this form. This is very important!

**Expenses**

Accounting, legal fees \$ \_\_\_\_\_

Advertising, promotion \$ \_\_\_\_\_

Meals/entertainment \$ \_\_\_\_\_

Lodging \$ \_\_\_\_\_

Parking \$ \_\_\_\_\_

Office supplies \$ \_\_\_\_\_

Telephone \$ \_\_\_\_\_

Is your employer registered for HST ?  YES  NO

Other expenses: \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

Automobile SEE BELOW

Home office SEE BELOW



## Automobile Expenses

Please ensure that you keep a log of kms driven in the year - CRA requires this!



Year/Make of Car: \_\_\_\_\_

Purchase Price \*\*\* \$ \_\_\_\_\_

Year Purchased \*\* \_\_\_\_\_

Total Kilometres driven in 2024 \_\_\_\_\_

Business or Employment Use % \_\_\_\_\_

**Expenses**

**Total for 2024**

Fuel \$ \_\_\_\_\_

Repairs \$ \_\_\_\_\_

Insurance \$ \_\_\_\_\_

Licensing \$ \_\_\_\_\_

Loan interest \$ \_\_\_\_\_

Lease payments (per month & annual amount) \$ \_\_\_\_\_

CAA membership \$ \_\_\_\_\_

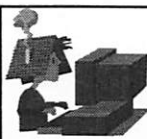
Any per km flat allowance received \$ \_\_\_\_\_

Other expenses \_\_\_\_\_

\*\* If a vehicle was disposed of in the year, please provide details

\*\*\* If leased vehicle, please provide a copy of purchase/lease paperwork

## Home Office Expense



Business or Employment Use % \_\_\_\_\_

(percentage of house used for business or employment)

**Expenses**

**Total for 2024**

Heat \$ \_\_\_\_\_

Hydro \$ \_\_\_\_\_

Water \$ \_\_\_\_\_

Insurance (self-employed or commissioned only) \$ \_\_\_\_\_

Maintenance, repairs \$ \_\_\_\_\_

Mortgage Interest (self-employed only) \$ \_\_\_\_\_

Prop. taxes / Rent (self-employed or commissioned) \$ \_\_\_\_\_

Other \$ \_\_\_\_\_