



Personal Tax Checklist
2024

Tax Returns to Be Prepared

(Include address if different from previous year)

Name	_____	Address	_____
Name	_____	Address	_____
Name	_____	Address	_____
Name	_____	Address	_____

Marital Status of Parent(s) (Please Select One, Only if Changed):

Married Divorced Single Separated Widowed Common Law

Date of 2024 change in marital status _____

Note if any children/dependents have a marital status of other than single.

Children Born in 2024:

Name	_____	Birth Date	_____
Name	_____	Birth Date	_____

Tuition Tax Credits:

Do you want to transfer tuition tax credits from children to parents? Yes ☐ No ☐
If yes, provide a signed T2022A from each child transferring credits

Principal Residence:

Did you sell any residences during the year (house, cabin, condo, etc.)? Yes ☐ No ☐
If yes, provide information on cost of residence, including major renovations and year of purchase.
Please also provide proceeds of sale and selling expense.

Foreign Property:

Did you or your spouse own foreign investments with a cost of more than \$100,000? (i.e. Rental house in another country, US brokerage account, etc. - does not include personal use property) Yes ☐ No ☐

Medical Expenses:

Did you pay for private health plan fees (i.e. Blue Cross, travel insurance, etc.)? Yes ☐ No ☐
If yes, provide copies of receipts.

Were you reimbursed by private health plan (i.e. Blue Cross)? Yes ☐ No ☐
If yes, provide copies of receipts.

Are you claiming prescriptions with your medical expense claim? Yes ☐ No ☐
If yes, provide a summary from the pharmacy rather than individual receipts

Digital News Subscription Tax Credit:

Did you subscribe to a digital news subscription in 2024? Yes ☐ No ☐
If yes, please provide copies of your receipts.

Please provide any additional comments below: