



E-MAIL: tax@hoyes.com
FAX: 1-888-553-5519
MAIL: #2A-800 King St. West
Kitchener, ON N2G 1E8

2024 INCOME TAX CHECKLIST

Please complete this form and return to us so that we can prepare your tax return for 2024. There is normally a delay in Canada Revenue Agency assessing returns for people in bankruptcy, so please provide your information as soon as possible. Benefits like the GST/HST credit, Canada Child Benefit, Climate Action Incentive Payment, Ontario Trillium Benefit and pension Guaranteed Income Supplement are only determined once the returns are assessed by CRA.

Name: _____

Marital status as of Dec. 31, 2024 and date of change if different than previous year. _____

If spouse's tax return not being prepared by trustee,

Spouse's Name: _____ **SIN:** _____ **Net income for 2024 (line 23600):** _____

Do you claim the **Disability Tax Credit**? If so, indicate if for yourself, spouse or a dependant. _____

Province of residence as of Dec. 31, 2024 and date of change if different than previous year. _____

Address of Dec. 31, 2024. _____

To receive the **Ontario Trillium Benefit**, provide documentation for rent or property taxes paid in 2024 (receipt, landlord letter). If no receipt is available, indicate in the field below the details of how much was paid, to whom the payments were made, and the address to which the payments relate. CRA may not approve your OTB application if no receipt is provided.

Specify name and date of birth for **Children** under age 18 living with you as of Dec. 31, 2024 and that you claim as a dependant.

Below is a list of common tax forms and documents. Please indicate which items are applicable to you and submit to the tax department along with this completed form. Original documents are not required. Please wait until you have collected all of your documents before sending to us.

Employment income **T4**
Employment insurance **T4E**
Other income or pensions **T4A**
Canada pension plan **T4A(P)**
Old age security **T4A(OAS)**
Social assistance or WSIB **T5007**
RRSP/RRIF withdrawals **T4RSP or T4RIF**
Interest and dividend income **T3 or T5**
Securities transactions **T5008**
Advanced Canada workers benefit statement **RC210**
Amount of spousal support paid or received
Summary of instalment payments made to CRA

Summary of employment expenses **T2200/T2200S**
Tuition/Education certificate **T2202**
Union and professional dues
Charitable donation receipts
Child care receipts
RRSP contributions and HBP repayment amount
Interest paid on student loans
Summary of medical receipts
Summary of moving expenses
Summary of self-employment income and expenses
Summary of rental property income and expenses
Summary of real estate dispositions (address, proceeds, legal costs, date and original cost of acquisition)