

Tax Year Checklist

2024

Important changes:

- BC's Renters Tax Credit – Are you eligible? See section below property details.
- We are on a 3-week turnaround schedule for most returns. If you have a non-registered account with capital gains to declare, this year's deadline is June 2nd. This capital gains reporting is unique to 2024 tax returns.
- Your paper returns will be available for pick up or mailed to you in June 2025.
- **If you plan to come by the office to drop off your taxes, please call to arrange a day and time.**
- Tax documents - if possible, please submit electronically (1 email or Client Portal or fax)
- Donations - please provide a total for 2024 (*keep your receipts*)
- Medical receipts - please provide totals per person/family member for 2024 (*keep your receipts*)
- Non-registered account at YF - please forward your tax documents **after** April 1st 2025
- Non-registered account outside of YF - please provide copies of your gain/loss statement

YOUR INFO

Your Name	Phone
Spouse Name	Spouse Phone

ANY CHANGES SINCE LAST YEAR?

Your Name	Your SIN
Spouse Name	Spouse SIN/DOB
Your Email	Spouse Email
Address for Tax Return:	

LIVING IN BC on December 31 st , 2024? Yes <input type="checkbox"/> No <input type="checkbox"/> If not, where:
MARITAL STATUS: Single <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> Divorced <input type="checkbox"/> Common Law <input type="checkbox"/> Date of Change [d/m/y]:
CANADIAN CITIZEN? Yes <input type="checkbox"/> No <input type="checkbox"/> SPOUSE CANADIAN CITIZEN? Yes <input type="checkbox"/> No <input type="checkbox"/>
FOREIGN PROPERTY / INVESTMENTS more than \$100,000 Canadian \$
SOLD PROPERTY? Please complete our new Sale of Property Checklist
BOUGHT PROPERTY? Yes <input type="checkbox"/> No <input type="checkbox"/> Purchase \$
BC RENTER'S TAX CREDIT
Renter Income less than \$63,000 Yes <input type="checkbox"/> No <input type="checkbox"/> Family Income less than \$83,000? Yes <input type="checkbox"/> No <input type="checkbox"/>
If yes, # of months _____ in 2024, Monthly Rent _____ at this Address _____
FULL NAME OF COMPANY OR LANDLORD YOU PAY RENT TO _____

IF WE ARE NOT DOING YOUR SPOUSE'S TAXES

Spouse Name	2024 Estimated Earnings \$
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DEPENDENTS

Name / DOB / SIN	Name / DOB / SIN
Tuition	Tuition
Childcare Expenses	Childcare Expenses
Disability Tax Certificate? Yes <input type="checkbox"/> No <input type="checkbox"/>	Disability Tax Certificate? Yes <input type="checkbox"/> No <input type="checkbox"/>

OTHER DOCUMENTS / RECEIPTS in addition to the regular T-Slips, please provide:

Union Dues	T5008 (gain/loss)	Dec. 31 Investment Statements [gain/loss]
T2200 [employment expenses]	Commissions [NOT on T4]	Spousal Support Paid/ Received /Taxed?
T2202 (tuition receipt)	Server Tips \$	YF Checklists (Moving/Rental/Medical)
Student Loan Interest Paid	Donations \$	Regular T-Slips: T4, T4A, T3, T5, T4RSP, T4RIF, T4OAS, T4AP

PRICING – see Pricing Sheet