

4. **Income Tax Instalments paid for 2024** (enclose the CRA statement) \$ _____

5. **Ontario Tax Credits**

Please provide details of rents or property taxes paid in respect of your principal residence(s) during 2024.

<u>Property Address</u>	<u>Landlord/Municipality</u>	<u>Amount</u>
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80 **Wpfgt wugf 'J qwlpf 'Vcz** **Yes** **No**

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9. **Family Information**

A copy of your spouse's 2024 tax return (if we do not prepare your spouse's return).

Name and date of birth of any children born in 2024: _____

For purposes of the transfer to you of the student's tuition, we require the details of your child's income and deductions for 2024 if we do not prepare your child's income tax return:

Yes **No**

Do you wish to file an election to split your eligible pension income with your spouse if it is found beneficial to lowering the aggregate of your total taxes payable?

:. **Foreign Reporting Requirements** **Yes** **No**

(a) Did you own or hold foreign property at any time in 2024 with a total cost of more than CAN \$100,000?

(b) In 2024 or a previous year, did you loan or transfer funds or property to a non-resident trust?

(c) In 2024, did you receive funds or property from, or were you indebted to, a non-resident trust in which you had or will have absolute or conditional rights as a beneficiary, either directly or indirectly?

(d) In 2024, did you have an interest in a foreign affiliate?

(e) I have not answered these questions, as I am not sure of the foreign reporting rules. Accordingly, please contact me to discuss my reporting requirements:

(f) Please provide the number of days you were present in the United States during:

i) 2042 _____ days ii) 2023 _____ days iii) 2024 _____ days

If you answered yes to any of the above questions, please contact Taylor Leibow for details.

:. **Elections Canada** **Yes** **No**

Are you a Canadian citizen?

If yes, do you agree to the CRA providing, over the next 12 months, your name, address, and date of birth to Elections Canada to help keep up to date your information currently on the National Register of Electors?

Are you a citizen of the United States of America?

32. **I UVW UV'Tgi kmcpw'hpri** **Yes** **No**

Is Taylor Leibow LLP preparing and filing your 2022 HST return?

If yes, please provide a copy of your 2021 Notice of Assessment with your BN# and CRA Access Code.

33. **Other Information** **Yes** **No**

Please enclose details of other pertinent income tax information.

**HELPFUL TIPS
TO FOLLOW IN ORGANIZING
YOUR PERSONAL TAX RETURN INFORMATION**

In order for us to prepare your return accurately and efficiently, read and consider the following helpful items:

- **Read our checklist** and complete it as required.
- **Organize your material.**
- **We prefer that you compile your documents electronically. Once you have them compiled electronically, you can email documents@taylorleibow.com and a secure link will be sent to you to allow your documents to be uploaded.**
- **If you are submitting your materials in hard copy, please bring it in early** to eliminate the last minute rush and reduce the opportunity for errors.
- **Open envelopes, remove and organize T3, T4, T5, RRSP and other slips.**
- **Medical expenses** – provide receipts and the total amount of medical claims.
- **Charitable donations** – provide receipts and the total amount of donation claims. (All receipts require an official charitable registration number.)
- **Business expenses** – **summarize total revenue and expenses** and provide the total amounts by the following categories. *Do not provide us with your paid bills.*
 - Advertising, business tax, fees, licenses and dues, insurance, interest, maintenance, meals and entertainment, motor vehicle expenses, office expenses, supplies, purchases, professional fees, property taxes, rent, salaries and wages, travel, telephone and utilities, and other expenses.
- **Securities** – If you have **sold shares, bonds** or other similar securities, provide us with the sales price, cost and broker's commissions paid for each security sold and the annual broker's trading summary. *Do not provide us with your broker slips.*

**HELPFUL AND EASY TIPS
TO FOLLOW IN ORGANIZING
YOUR PERSONAL TAX RETURN INFORMATION**

- **Rental income** – summarize total rental revenue and expenses and provide the total amounts by the following categories. *Do not provide us with your paid bills.*
 - Advertising, insurance, interest, maintenance, administration fees, motor vehicle expenses, office expenses, professional fees, property taxes, travel, utilities and other expenses.

- **Home office expenses** – summarize and provide the total amounts by category as follows:
 - Provide your percentage of business or employment use.
 - Heat, hydro, insurance, maintenance, mortgage interest, property taxes and other expenses.

- **Motor vehicle expenses** – summarize and provide the total amounts by category, as follows:
 - Provide your percentage of business or employment use.
 - Fuel and oil, maintenance and repairs, insurance, licenses, interest, lease payments, parking, car washes, automobile club and other expenses.

- **Foreign Property** – Provide details if you owned foreign property at any time during the year with a cost of greater than \$100,000 CDN.

- **Additional information or questions** – please provide additional information if required or call us.