

2024 Reminder Personal Income Tax Returns

This document is a reminder to help you gather all your documents and provide us with all the relevant information to prepare your tax returns as well as those of your family.

We ask that you take the time to read it carefully and provide us, from the outset, with all the necessary documents and information for your file. This will allow us to be more efficient and reduce the preparation time of your tax returns and, consequently, your fees.

YOU DO NOT NEED TO PROVIDE US WITH THIS COMPLETED DOCUMENT

Instead, complete the “**Required Form**” and provide any relevant information in the “Comments” section of the form or in a separate document.

The questions included in the “**Required Form**” are not repeated in this document.

Refer to the “**What’s new for 2024**” document to learn about new credits or changes that may apply to your situation.

TO HELP US

- **Please wait until you have all your documents before sending them to us.** *Incomplete files force us to set your file aside, return to it later, and thus double the work and time we devote on it.*
- **Never send us documents in photo format.** These documents present significant challenges and result in wasted time (they are often illegible and cannot be sorted in PDF format). *There are smartphone apps available that can easily convert photos into PDF.*
- As much as possible, provide us with everything either in paper format or electronic format (PDF), but not a combination of both.
- **If you have fewer than 20 slips** and are sending them to us in PDF format, please gather them into a single document except for medical expenses, which should be in a separate document.
- **If you have 20 slips or more**, group them by type of slip (e.g., donations, investment statements, medical expenses, other slips) before uploading them.
- Do not group documents for your personal tax returns with those of your company, if applicable. Send them in two separate envelopes or upload them separately on the respective portals.
- Please send your documents in a single upload, as we receive an email each time.
- Avoid sending us duplicate documents.

DOCUMENTS TO BE PROVIDED

- Copies of your 2023 Notices of assessment.
- Copies of your tax instalment statements for 2024.
- Copies of your previous year’s returns. *(if these were not prepared by us)*
- Copy of correspondence received from the tax authorities, if any.

INCOME

In order to assist you in gathering the documents required for the preparation of your income tax returns, please answer the following questions, provide the requested documents and complete the additional schedules, if applicable. Please provide the information for all persons in your family for which we are preparing 2024 income tax returns.

As a resident of Canada, you must report your income from all sources, both inside and outside Canada.

- | | | |
|---|---|---|
| 1. Are you an employee? | <input type="radio"/> Yes
<input type="radio"/> No | If yes, please provide your T4, T4A/Relevé 1, Relevé 2 and Relevé 22 information slips. |
| 2. Did you exercise any stock options? | <input type="radio"/> Yes
<input type="radio"/> No | If yes, please forward any information provided by your employer, including your T4/Relevé 1 information slips. |
| 3. Do you have any additional employment income? | <input type="radio"/> Yes
<input type="radio"/> No | If yes, please provide your T4A/Relevé 1 and Relevé 2 information slips or other documents received. |
| 4. Did you receive any employment insurance benefits or any disability benefits from the CNESST, SAAQ, IVAC, social assistance payments or any payment for maternal or paternal leave of absence? | <input type="radio"/> Yes
<input type="radio"/> No | If yes, provide your T4E, Relevé 5 and Relevé 6 information slips. |
| 5. Are you a non-incorporated self-employed person (health professional or other, earning business or professional income)? | <input type="radio"/> Yes
<input type="radio"/> No | If yes, please provide your T4A/Relevé 1 slips and your Relevé 27 and complete the Excel sheet Business Income and expenses for Health Professionals or Self-Employed Persons , as applicable to your situation. |
| 6. Did you receive any Canada or Québec Pension Plan benefits, Old Age Security benefits or any retirement allowance? | <input type="radio"/> Yes
<input type="radio"/> No | If yes, please provide your T4A, T4A(P), T4(OAS), Relevé 1 and Relevé 2 information slips. |
| 7. Did you receive any amounts or make any withdrawals from your RRSP, RRIF, pension plan, FHSA or other? | <input type="radio"/> Yes
<input type="radio"/> No | If yes, please provide your T4RSP, T4RIF, T4PS, T4FHSA, Relevé 2 and Relevé 25 information slips. |
| 8. Did you receive any amounts from your Registered Education Savings Plan or receive any scholarships? | <input type="radio"/> Yes
<input type="radio"/> No | If yes, please provide your T4A, Relevé 1 and Relevé 2 information slips. |
| 9. Did you receive, in 2024, any Universal child care benefits (UCCB), for prior years? | <input type="radio"/> Yes
<input type="radio"/> No | If yes, please provide the RC62 information slip. If you have a spouse, the UCCB must be reported on the income tax return of the spouse with the lowest net income, regardless of which spouse received the benefits. |

If we do not prepare your spouse's income tax returns, please indicate the amount on line 11700 of his or her federal return \$_____.



INCOME (continued)

10. Did you receive any investment income (dividends, interest, trust income, partnership income or income from any tax shelters)?
- Yes** If yes, please provide your T3, Relevé 16, T5, Relevé 3, T5013, Relevé 15, T101, Relevé 11, T5008 and Relevé 18 information slips.
- No**

11. Did you dispose of (sell) any investment property (such as shares, bonds, mutual funds, etc.) from your accounts:

- With a broker?

- Yes** If yes, for each account, please obtain a summary of the capital gains and losses for the year from your broker.
- No**

- Without a broker (such as direct investing)?

- Yes** If yes, for each account, please provide us with your investment summary indicating all sales transactions that occurred in the year, including the cost (or average cost, if required) as well as the sales price. If you do not have an investment summary, please provide us with the details and statements for all transactions in the year.
- No**

12. Did you dispose of (sell) any property (such as a principal residence, cottage, rental property, land, artwork or jewelry, etc.)?
- Yes** If yes, please provide the details, including the date of purchase and sale of the property, the purchase and sales price, including the currency if not in Canadian dollars. Please provide any other information you deem pertinent.
- No**

A deemed disposition must also be reported on your income tax returns. A deemed disposition can occur when you have a change in the use of a property. For example, if a rental property (or part of a rental property) starts being used as a principal residence or, conversely, if you start renting your principal residence.

13. Did you receive any other income, with or without any information slips?
- Yes** If yes, please provide the information slips. If no slips were received, please provide us with the details of any additional income received (example: foreign income).
- No**

14. Did you receive any advance payments (for work premium, child care expenses, home-support services for seniors)?
- Yes** If yes, please provide your Relevé 19.
- No**

15. Do you own one or several rental properties, alone or with any co-owners?
- Yes** If yes, please complete the **Real estate rental income and expenses schedule**.
- No**

16. Did you receive any support (alimony) payments?
- Yes** If yes, please provide the amount received, the name of the payer and indicate if the amount was for you or for your children. If this is the first year, please send us a copy of the agreement or judgment.
- No**



DEDUCTIONS AND CREDITS

This section will assist you in gathering the information and documents necessary for you to benefit from the deductions and credits to which you are entitled to for 2024.

1. Did you have any deductible employment expenses (employee)?

Yes
 No

If yes, please provide forms T2200 and TP-64.3 duly completed and signed by your employer, as well as the details of your deductible employment expenses.
2. Did you refund any COVID-19 related benefit payments?

Yes
 No

If yes, please provide the official receipts.
3. Did you pay any union or professional dues required for you to earn a salary and which were not included on your T4/Relevé 1 slips. **These must not have been reimbursed or paid by your employer and must be related to your employment.**

Yes
 No

If yes, please provide the official receipts for these union or professional dues.
4. Do you have a Home Buyers' Plan or Life-long Learning Plan balance that must be reimbursed?

Yes
 No

If yes, we will use part of your RRSP contribution to make the minimum required annual repayment.
5. As a self-employed person, did you have any motor vehicle or home office expenses?

Yes
 No

If yes, please complete the **Motor vehicle expenses and Home office expenses schedules** included in the **Excel file Business Income and Expenses**.
6. Did you move?

Yes
 No

If yes, please answer the following questions.

Yes
 No

Did you sell your residence? If yes, please provide the purchase and sales contract of the property sold (we will contact you if we require additional information).

Yes
 No

Following your move, did you reduce the distance between your home and your new workplace or school by at least 40 km? If so, please indicate this in the comments of the Required Form (we will contact you will contact you to obtain more information).



DEDUCTIONS AND CREDITS (continued)

6.1 Have you acquired a home for the first time?

- Yes** If yes, please provide the date of acquisition of the property:
 No _____ (YYYY-MM-DD).

Roll number or cadastral designation as shown on the municipal tax bill for the home (or provide tax bill).

Who is the owner of the home?

- You You and your spouse
 Your spouse You and another person

If you indicated "another person", please provide their information, as follows:

Last name: _____

First name: _____

S.I.N.: _____

If we do not prepare the tax returns for the other co-owner, please indicate who will be claiming the applicable credit:

- You You and your spouse
 Your spouse You and another person

6.2 Did you acquire a property to make it a home for a disabled person?

- Yes** If yes, please provide the following information for the applicable disabled person.
 No

Last name: _____

First name: _____

S.I.N.: _____

7. Have you made any qualified expenditures for recognized work in relation to the residential waste water treatment systems?

- Yes** If yes, please provide us with the date of the agreement entered into with the contractor, all the details regarding the contractor and the work carried out, as well as the amounts paid or a duly completed TP-1029.AE-V *Tax Credit for the Upgrading of Residential Waste Water Treatment Systems* form. Please note that the agreement with the contractor must have been entered into after March 31, 2017 and before April 1, 2027. To claim the credit in your 2024 income tax return, the expenditures must have been paid for in 2024. You must obtain and provide us with a copy of the compliance certificate TP-1029.AE.A-V, duly completed and signed by the contractor who carried out the work.
 No



DEDUCTIONS AND CREDITS (continued)

8. Are you a non-incorporated **self-employed** person (health professional or other)? **Yes** **No** If yes, please complete the **Excel file Business Income and Expenses for Health Professionals or Self-Employed Persons** as applicable to your situation to properly reflect your income and expenses.
9. Did you pay any interest on cash damming? **Yes** **No** If yes, please provide the statement of account indicating the interest paid to be deducted for 2024. Do not include the amounts already indicated on the professional income and expenses schedule, if this is applicable to you.
10. Did you have to pay interest to earn any investment income or pay for any professional, investment management or legal fees? **Yes** **No** If yes, please provide statements or official receipts issued regarding these.
11. Did you pay for any child care expenses? **Yes** **No** If yes, please provide the official receipts (Relevé 24 and other receipts). To obtain a Quebec tax credit, a Relevé 24 is now required for all child care expenses over \$5,000 from a single provider.
12. Did you pay any amount for activities eligible to the Children's fitness amount or Children's arts amount? Please note that these credits have been eliminated at the federal level, but may still be applicable in certain provinces. In Québec, your family income must not be higher than \$163,800 in order to benefit from this credit. **Yes** **No** If yes, please provide the official receipts for the amounts paid in 2024.
13. If you are an eligible educator, did you pay any amount for school supplies? **Yes** **No** If yes, please provide the official receipts for the amounts paid in 2024.
14. Did you pay any interest on a student loan? **Yes** **No** If yes, please provide the official receipt for the amount paid in 2024.
15. Did you pay for any tuition fees for studies done outside of Canada (post-secondary education for you, your spouse or your children or for occupational skills courses paid to a post-secondary educational institution)? **Yes** **No** You must obtain a duly completed and signed form TL11A from the university.
16. Did you make any political contributions? **Yes** **No** If yes, please provide the official receipts.
17. Did you make any charitable donations to registered charities? **Yes** **No** If yes, please provide the official receipts. *Please note that donations made (except donations of goods) until February 28, 2025 can be included in 2024.*



DEDUCTIONS AND CREDITS (continued)

- | | | |
|--|---|---|
| <p>18. Did you pay alimony or make child support payments?</p> | <p><input type="radio"/> Yes
<input type="radio"/> No</p> | <p>If yes, please complete the Separation-Divorce schedule and indicate the pension amounts paid for your ex-spouse and for your children.</p> <p>If this is the first year, please send us a copy of the agreement or judgment.</p> |
| <p>19. Did you have any adoption or infertility treatment expenses?</p> | <p><input type="radio"/> Yes
<input type="radio"/> No</p> | <p>If yes, please provide the details and applicable amounts. Please note that not all amounts paid are eligible. An analysis of these amounts will be required. Expenses for a medical intervention to conceive a child, even if you do not have a medical condition, may now be eligible.</p> |
| <p>20. Do you house or have an eligible relative (for example: mother, father) for whom you can get the Canada caregiver amount (or provincial credit)?</p> | <p><input type="radio"/> Yes
<input type="radio"/> No</p> | <p>If yes, please complete the Family schedule and provide the information requested for the eligible dependant. Please provide the dependant's income if we do not prepare the income tax returns for this person.</p> |
| <p>21. Did you have any medical or dental expenses that were not reimbursed by your insurance company, a government program or other (example: Canada Dental Benefit)?</p> | <p><input type="radio"/> Yes
<input type="radio"/> No</p> | <p>If yes, please the Excel file Frais médicaux (not translated yet) and receipts for the medical, dental or other expenses paid.</p> <p>Concerning your prescription drugs, please obtain an annual receipt from your pharmacist for the total amount paid.</p> <p>If a portion of these expenses was reimbursed by your insurance, government program or other, please provide the detailed statements (and not summary) so we can determine what you may claim (several types of expenses are not eligible or are only eligible in Quebec and not at the federal level).</p> |
| <p>22. Did you pay for medical insurance premiums (medication, medical and dental care) for you, your spouse or your children (amounts not already included on your T4 or T4A information slips)?</p> | <p><input type="radio"/> Yes
<input type="radio"/> No</p> | <p>If yes, please provide the official receipt.</p> |
| <p>23. Did you pay for a qualifying renovation with respect to the Multigenerational Home Renovation Tax Credit in order to allow for the creation of a secondary unit for the purpose of housing a senior person or a person with a disability?</p> | <p><input type="radio"/> Yes
<input type="radio"/> No</p> | <p>If yes, you may be entitled to a tax credit of 15 % for the expenditures of a maximum of \$50,000 for the qualifying renovation (maximum credit of \$7,500). Please provide us with the receipts for the qualifying expenditures.</p> |



DEDUCTIONS AND CREDITS (continued)

24. If you were 65 years or older in 2024 or if you are eligible for the disability tax credit, did you pay amounts for eligible renovations to allow access to the home or reduce the risk of injury inside the eligible home?
- Yes If yes, you may be entitled to a tax credit for eligible renovation expenses of up to \$20,000 that allow access to the home or reduce the risk of injury inside the eligible home for the specified individual. Please provide us with the invoices for these works.
- No
25. If you were 70 years old or older in 2024, did you pay for any services allowing you to remain in your residence (for example: bathing and meal assistance, house-keeping, etc.)?
- Yes If yes, please provide the receipts for the amounts paid. Please note that the credit is based on your family income. This means that the credit will be reduced if your family income is higher than \$69,040 in 2024.
- No
- Also, please provide the following information regarding your rent:
- Amount of your rent for January 2024: _____.
- Rent increased in _____ 2024
(for example, increased in July).
- Amount of your rent for December 2024: _____.
26. If you were 70 years old or older in 2024, did you pay for the purchase or rental or for the installation of eligible equipment to allow you to remain in your home (for example: installation of a walk-in bathtub or shower, rail-mounted motorized chair for the stairs or other)?
- Yes If yes, please provide your receipts and the detail of the amounts paid. Please note that the first \$250 of expenses does not give rise to a credit.
- No
27. Are you eligible for the disability amount?
- Yes If yes, and if this is the first request for the disability amount, please provide forms T2201 and TP-752.0.14, duly completed and signed by an authorized medical practitioner. Nurse practitioners can now certify the application form for the disability tax credit.
- No
28. Were you a tenant on December 31, 2024?
- Please note that this question concerns the Solidarity Tax Credit. If your family income exceeds \$68,992 (person with spouse) or \$63,259 (person without spouse/or single parent), you are not eligible for this credit. Therefore, you do not have to send us any document.*
- Yes If yes, and if your family income is less than the threshold, please provide the Relevé 31 that was given to you by your landlord.
- No
29. Did you own your home on December 31, 2024?
- Please note that this question concerns the Solidarity Tax Credit. If your family income exceeds \$68,992 \$ (person with spouse) or \$63,259 (person without spouse/or single parent), you are not eligible for this credit. Therefore, you do not have to send us any document.*
- Yes If yes, and if your family income is less than the threshold, please provide a copy of your municipal property tax statement for 2024.
- No

