

# ACCOUNTABLE<sup>LLP</sup>

CHARTERED PROFESSIONAL ACCOUNTANTS

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## PERSONAL INCOME TAX CHECKLIST

Visit our new website: [accountablellp.ca](http://accountablellp.ca)

Name : \_\_\_\_\_

Contact at : \_\_\_\_\_

### Important Documents to bring

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- ( ) Quickbooks back-up or ledger book
- ( ) Bank statements and Agristability bank statements for the 2024 year
- ( ) Inventory listing for shop and farm
- ( ) Payroll deductions form (PD7A), WSIB and HST forms for the year
- ( ) List of loans receivable and balances at December 31, 2024, rate of interest on loans
- ( ) If not on quickbooks; accounts receivable and accounts payable listing
- ( ) Indicate if any accounts receivable are not collectible
- ( ) Final property tax bills and supplementary tax bills paid in 2024
- ( ) List of loans payable and balances at December 31, 2024, rate of interest on loans
- ( ) Loan statements at Dec 31, 2024 for bank loans, credit union loans, ACC loans, FCC loans etc.
- ( ) T4 summary and slips for wages paid out in 2024
- ( ) Amount of livestock or produce consumed personally
- ( ) Slips for AgriInvest or Agristability payments received in 2024
- ( ) Indicate if any expense amounts have a personal portion what amount or percentage
- ( ) Indicate if any expenses are common to shop and farm what portion should be allocated to each
- ( ) Other income (RRSP, RPP, RRIF)
- ( ) Income tax instalments, final statement indicating total for the year
- ( ) Donation receipts
- ( ) Medical expenses receipts, medical expense receipts for travel greater than 40 km
- ( ) T4, T4A, T4E, T5 and T3 slips
- ( ) Rental income & expenses, information on the sale of your principal residence or other property
- ( ) RRSP receipts
- ( ) Moving expenses
- ( ) Education deduction slip T2202
- ( ) Employment expense for T2200 or TL2 (signed by employer)
- ( ) Other deductions (carrying charges, safety deposit box, investment counsel fees, interest)
- ( ) Receipt for rent paid in the year showing to whom paid and address
- ( ) Did you work at home, if so how many days