

Checklist of documents you may need to provide

Below is a checklist to help you assemble the documentation we will need for the production of your 2024 personal income tax returns. This basic list proposes various sources of income as well as the main deductions and possible tax credits.

Please note that by default, your tax returns will be put on your CCH IFirm portal. If you do not have a portal, we will contact you with the steps for signing your documents. If you gave us original documentation for the production of your tax returns, we will return them to you by mail, unless otherwise specified.

Name: Spouse:	
Children:	
Basic docume	nts: □ Notices of assessment federal AND provincial for 2023 □ Void check (only if you are not already signed up to direct deposit)
	☐ Form "Attestations - principal residence" – must be completed and signed
INCOME	 Employment income: T4 and RL-1 Contractual income: T4A Investment income (interest, dividends, etc.): T3, T5 and RL-3 Capital gains / losses T-5008 School bursaries: T4A and RL-1 Pension income: Old age security: T4A(OAS) Pension income, QPP: T4A(P) Withdrawal of RRSP or RRIF: T4RIF and/or T4RSP Withdrawal of FHSA: T4FSHA Employment insurance income: T4E PPIP - Provincial parental insurance plan: T4E CNESST, SAAQ, social assistance: T-5007 and RL-5

	□ Self-employed worker (income and expenses): Complete the form provided * □ Rental income (income and expenses): Complete the form provided on request * □ T1135 if you have over \$100,000 of foreign property □ Sale of a principal residence: Complete the form provided on request * □ Cryptoassets: Complete de form provided on request *	
DEDUCTIONS	□ RRSP: official receipts (during the year and the first 60 days of 2025) □ FTQ or CSN RRSP: RL-10 □ FHSA: T4FHSA □ Declaration of conditions of employment related to working from home : T-2200 et TP-64.3 completed by employer and detail of expenses □ Union or professional dues □ Tuition and enrolment fees: T2202A and RL- 8 (can be found on student portal) □ Employment expenses: Complete the form provided on request * □ Interest paid on student loans: Bank statement □ Medical expenses: Complete the form provided * or submit a summary □ Moving expenses: Complete the form provided on request * □ Donations / Political contributions □ Donations made in January and/or February 2025 □ Instalment payments: □ Credit for home-support services (if you are over 70 years old) □ Credit for caregivers □ Solidarity tax credit: RL-31 (if you are a tenant) or Roll number on tax bill (if you are the owner) □ Advance payments of tax credits (Work premium, childcare expenses, etc.) RL-19 □ Credit for seniors' physical / artistic activities (must be 70 years or older as of December 31, 2024) □ Letter from the CRA indicating reimbursements made during the year with regards to a COVID-19 program.	
CHILDREN	 □ Childcare expenses: RL-24 and federal slip □ Advance payments of childcare expenses: RL- 19 □ Credit for children's physical / artistic activities for children that are atleast 5 years old on January 1st 2024 	
Others (please specify):		

^{*}Please note that we have developed templates for questionnaires to help you send us your financial information. Please contact us by email at info@vgsp.ca for an electronic copy. With this, you will have the questionnaire in electronic format which you can fill out on screen and send the completed form back to us.