

2024 HENDRY WARREN PERSONAL TAX CHECKLIST – QUEBEC FILERS

Any changes to the information below from prior year? (If yes, please complete table below)		Yes	No
Name:	Social Insurance Number:	Email:	
Date of Birth (YYYY/MM/DD):	Telephone Number:		
Marital Status:	Present Address:		
<i>Personal Changes</i>	Additional Dependents? (Provide Name, DOB, and SIN on the last page)	Yes	No
	Did you purchase your first home in 2024?	Yes	No
	Did you move in 2024?	Yes	No
	If yes, did you sell or change the use of real estate in 2024? (If yes, fill out Appendix A)	Yes	No
	Other – Please Specify _____		
<i>Other</i>	Are you a Canadian citizen?	Yes	No
	As a Canadian citizen, do you authorize the CRA to provide your name, address, date of birth, and citizenship to Elections Canada to update your information on the National Register of Electors?	Yes	No
	My employer or my spouse's employer provided basic prescription drug insurance for myself (all year)	Yes	No
	My employer or my spouse's employer provided basic prescription drug insurance for myself (partial year; please confirm months)	Yes	No
	Did you own or hold foreign property for the purpose of earning income at any time in 2024 with a total cost of more than CAD \$100,000? Examples include foreign real estate (except exclusively held for personal use), shares of foreign corporations held in Canadian or foreign brokerage accounts, foreign bank accounts, etc.	Yes	No
	Are you a US citizen or green card holder?	Yes	No
	(If yes, do you have a Tax-Free Savings Account (TFSA)?)	Yes	No
<i>Income Slips (provide copies of slips)</i>	T4 & RL-1 - Employment Income	Yes	No
	T4A OAS - Old Age Security	Yes	No
	T4AP - Canada or Quebec Pension	Yes	No
	T4A & RL-1/RL-2 - Pension/Other Income	Yes	No
	T4RIF/T4RSP & RL-2 - RRIF/RRSP Income	Yes	No
	T4E & RL-6 - Employment Insurance	Yes	No
	T5013 & RL-15 – Partnership Income	Yes	No
	Other – Please Specify _____		

Other
Income

Business/Professional Income – (If yes, please fill out Appendix B and Appendix C)	Yes	No
Rental Income – (If yes, please fill out Appendix D)	Yes	No
Spousal Support Received	Yes	No
If yes, please provide name, SIN, and address of payor:		
Name: _____		
SIN: _____		
Address: _____		
Scholarship, Bursary & Fellowship Income	Yes	<input checked="" type="radio"/> No
Share Based Compensation (Stock Options, RSUs, etc.) in 2024 (If yes, please fill out Appendix E)	Yes	No
Other – Please Specify _____		

Investments

T3 & RL-16 - Income from a Trust	Yes	No
T5 & RL-3 – Investment Income	Yes	No
Capital Gains or Losses (Provide gain/loss reports in CAD)	Yes	No
T1135 - Foreign Income Statement (foreign investments costing over 100,000 CAD)	Yes	No
Cryptocurrency transactions (provide detailed summary of transactions in 2024)	Yes	No
Other – Please Specify _____		

Deductions
(Provide
Receipts)

RRSP Contributions (remainder of 2024 and first 60 days of 2025)	Yes	No
Did you open a First Home Savings Account (FHSA) in 2024?	Yes	No
Did you make any contributions to a FHSA in 2024? (provide receipts)	Yes	No
Union or Professional Dues	Yes	No
Childcare Expenses (Please provide receipt with the name, address, and SIN/BN of childcare provider <u>or</u> RL-24 Slips and confirm how the claim should be split between you and your spouse)	Yes	No
Moving Expenses	Yes	No
Spousal Support Paid	Yes	No
Child Support Paid	Yes	No

If applicable, please provide name, SIN, and address for recipient of spousal or child support:

Name: _____

SIN: _____

Address: _____

Investment Management Fees	Yes	No
Interest Expense	Yes	No
Employment Expenses (enclose signed T2200) (If yes, please fill out Appendix F and Appendix G)	Yes	No
Other – Please Specify		

*Tax
Credits
(Provide
Receipts)*

Tuition (T2202 or TL11A for foreign tuition or RL-8 for Québec)	Yes	No
Medical Receipts	Yes	No
Medical Insurance Premiums (include annual statement)	Yes	No
Home Accessibility Expenses	Yes	No
Donations (contributed between January 1, 2024 – February 28, 2025)	Yes	No
Political Contributions	Yes	No
Teacher and Early Child Educator School Supply Tax Credit	Yes	No
Interest on Student Loans	Yes	No
Digital News Subscription Tax Credit	Yes	No
Children's Activity Tax Credit	Yes	No
Seniors' Activity Tax Credit	Yes	No
Tax Credit for Upgrading of Residential Wastewater Treatment Systems	Yes	No
CRA tax instalments for the 2024 tax year (provide amount)	Yes	No
Québec income tax instalments for 2024 (provide amount)	Yes	No
To the extent that one spouse is owed a refund and the other spouse has a balance due in Québec, apply the refund of one spouse to the balance due of the other spouse	Yes	No
Other – Please Specify		

Please provide us with a copy of your 2023 Québec Notice of Assessment and copies of any Québec reassessments received during 2024 in respect of previous years.

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Schedule of Additional Dependents

Name	SIN	DOB (YYYY/MM/DD)