



## 2024 T1

# Personal tax preparation form

*Please complete this form and return it to us together with your financial information.*

Number of tax returns to be prepared: \_\_\_\_\_

Personal information	Spouse information (if applicable)
Name: _____	_____
SIN: _____	_____
Date of birth: _____	_____
Phone #: _____	_____
E-mail: _____	_____
Address: _____	_____
City: _____	_____
Province: _____	_____
Postal code: _____	_____

Did you immigrate to Canada during the year: Yes No

**Marital status** (on Dec 31): Single Married Common-law Separated Divorced Widowed

Did your marital status change from last year's tax return? Yes No Date status changed: \_\_\_\_\_

Are we preparing a tax return for your spouse? Yes No N/A

If we are **NOT** preparing a tax return for your spouse, please provide: income figure from Line 23600 \$ \_\_\_\_\_

Please list all dependants below.

	Dependant 1	Dependant 2	Dependant 3	Dependant 4
Name:				
Relationship:				
Date of birth:				
SIN:				
Net income:				

1. Do you, your spouse or any of your dependants qualify for the Disability Tax Credit? Yes    No  
If yes, please indicate whom: \_\_\_\_\_
2. Did you, your spouse or any of your dependants dispose of a principal residence? Yes    No  
If yes, please indicate what year: \_\_\_\_\_
3. Do you, your spouse or any of your dependants want to register to receive e-mail notifications from CRA? Yes    No  
If yes, please confirm that email address: \_\_\_\_\_
4. Are you a Canadian citizen? Yes    No
5. Did you, your spouse or any of your dependants open a First Home Savings Account? Yes    No
6. Do you or your spouse own or hold foreign property (including shares) with a cost of more than CAN\$100,000? Yes    No
7. Have there been any changes to your direct deposit details? Yes    No  
If yes, please include a void cheque with this form.
8. Did you work from home during the year? Yes    No  
If yes, please include a signed form T2200 from your employer.
9. Did you pay rent or property tax during the year? Yes    No  
If yes, please indicate to whom and how much: \_\_\_\_\_
10. Do you have a rental property, sell your rental property, or have self-employment income? Yes    No
11. Are you a first-time home buyer? Yes    No

Other forms available on our website [www.rougevalleyaccounting.ca](http://www.rougevalleyaccounting.ca):

- 2024 T1 Personal Tax Checklist
- 2024 T1 Real Estate Rental
- 2024 T1 Self-Employment Income & Expenses
- Underused Housing Tax (UHT) Quick Reference Chart

Please see our Personal Tax Checklist for a comprehensive list of forms and receipts to include with your income tax package.

**ALL** personal income tax packages should be emailed to: [brian@rougevalleyaccounting.ca](mailto:brian@rougevalleyaccounting.ca)  
or dropped off in our office mail slot: **345 Kingston Road, Suite 206  
Pickering, ON L1V 1A1**

