Personal Tax Preparation Checklist

If you are unable to access our website www.seniuk.com and require any of the forms mentioned below or have general questions, please contact our office 780-482-3431 ext 301.

NOTE - the deadline for purchasing RRSPs to claim on your 2024 tax return is March 3, 2025. Your available contribution room will be noted on your 2023 notice of assessment.

The deadline for filing personal tax returns is April 30 (June 15 if self-employed), so please send us your **complete** information ASAP via drop off, mail, courier, or upload to our secure Client CaseWare Cloud Portal which can be accessed through our website. For cloud assistance, please call our office – ext 301. If you are uploading to the cloud, please inform us by email – reception@seniuk.com - so your upload is not overlooked. **WE REQUIRE ANY DOCUMENTS UPLOADED TO BE SCANNED. A picture of the document taken with a cell phone camera is highly insufficient** as it is time consuming and difficult to work with. All scanned documents are to be uploaded as one pdf file. Please do not upload each document individually (i.e., 10 documents = 10 uploads).

CRA's My Account – If you have not already done so, we highly recommend registering for this service through CRA's website. For more information on "My Account" or how to register, please follow the link on our website.

Identification – if any of your identification has changed since your last return filed, please include clear notification of this. This would include a change in marital status, address, phone number, email or dependents. Provide first and last name, birthdate, SIN and address of any new dependents.

Disposition of principal residence, although non-taxable, must be reported on your tax return. If you have sold your principal residence during the year, include the property address, year it was purchased, and amount of sale. Disposition of a principal residence not reported on your tax return, is subject to penalties.

Investment Gains and Losses – it is vital to provide the original cost and year of purchase of any disposals. A**lso, if you have received an investment account tax package from your financial institution, please be sure to include it with the rest of your tax information.**

Income/Expenses from rental, business or farm – if your return contains activities from rental property, self-employed business or farm, we require the information in summary form. Summary forms are available on our website under Personal Forms and Checklists. Complete the summary(ies) that would apply to you and submit with the rest of your tax information. If you have multiple rentals, businesses or farms, a separate summary is required for each entity. **PLEASE DO NOT SEND US THE INDIVIDUAL RECEIPTS OR INVOICES. WE WILL PREPARE YOUR RETURN FROM THE SUMMARY FORMS ONLY.**

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Employment Expenses – can only be claimed if you have provided us with a completed and signed Form T2200 from your employer. Expenses are to be in summary form. Summary forms are available on our website under Personal Forms and Checklists. **DO NOT SEND US THE INDIVIDUAL RECEIPTS OR INVOICES. WE WILL PREPARE YOUR RETURN FROM THE SUMMARY FORMS ONLY.**

All claims for deductions of RRSP, union dues, childcare, tuition, medical, charitable donations, etc. must be supported with proper and complete official receipts.

Medical expenses – can only be claimed if the total medical expense exceeds 3% of your net income or $2,759. Prescriptions – if you have numerous prescription receipts, please obtain a detailed printout from your pharmacy rather than giving us the individual receipts**.** Detailed printouts can also be obtained from dentists, chiropractors, physio therapists, optometrists, and many others. Medical or dental insurance premiums paid by you are also deductible. This includes Blue Cross and travel insurance for which you have receipts.

Foreign Property – if you hold foreign property of more than $100,000 CDN, you are required to file form T1135, Foreign Income Verification. There are substantial fines and penalties for failure to do so. There is an additional charge for filing this form as it is not part of the T1 tax return.

T183 and other forms requiring your signature - We will be utilizing the electronic signature format on all forms requiring your signature. If you previously provided us with your signature template, there is no need to complete another one for this year. If you choose not to consent to this electronic format, you will be required to sign any forms in person.

If your return results in a balance due, you can pay your taxes online through your CRA "My Account". You can also pay using online banking the same way you would pay your phone or power bill, etc. Under "Add a Payee" look for an option such as CRA – current year tax return. Your 9-digit SIN will be your account number. If "My Account" or online banking is not an option, you can also pay the taxes in person at the bank teller using a personalized remittance voucher. Please contact our office if we have not provided you with one.

Client Copies

For those with email - a pdf copy of your full tax return will be accessible by you at any time on our Client CaseWare Cloud Portal.

For those without email, you will be provided with a scaled down copy of your return as filed.

Review your return – the responsibility for your tax return lies with you so please review your return and notify us immediately of any errors or omissions. In addition, notify us immediately if your return has been assessed differently than as filed.

T1 Adjustments - **an additional fee will apply** if your already filed return requires an adjustment due to missing information not initially supplied to us, or for incorrect information supplied.

CRA Review Requests – if your return has been selected for review by CRA, please notify us immediately as timely responses to CRA are required. **An additional fee will apply** for responses to CRA review requests.

We look forward to another successful tax season and wish you and your family all the best in 2025.

The Team at Seniuk and Marcato, CPAs