

2024 INCOME TAX CHECKLIST

DON'T FORGET TO COMPLETE THE IDENTIFICATION QUESTIONNAIRE AND TO HAND IT IN WITH YOUR DOCUMENTS.

EMPLOYEE

T4 employment slips or commission (T4, T4A, RL1)
Employee in construction industry - CCQ (RL22)
Union and professional dues
Training costs
Moving expenses for work (+40 km)
Employment expenses:
Declaration of Conditions of Employment form signed by employer (T2200/TP-64.3)
Vehicle expenses [EXCEL ↓](#)
Home office expenses [EXCEL ↓](#)

FAMILY

Child care expenses (RL24)
Advance payments of tax credit for child care (RL19)
Children's physical and artistic activities (QC 5 to 16 years – Max family income \$163,800)
Adoption expenses / Infertility treatment expenses

RETIREE

Old Age Security pension (T4AOS)
CPP or QPP benefits (T4AP, RL2)
RPP retirement benefits (T4A, RL2)
RRSP and RRIF income (T4RSP, T4RIF, RL2)
Home-support services for seniors (QC 70 years+)
Advance payments of tax credit for home-support services for seniors (RL19)

INVESTMENTS

Interest and dividends income (T3/RL16, T5/RL3)
Sale of shares (T5008, RL18)
Carrying charges and interest expense
Cryptocurrency

OTHER

RRSP or FHSA contributions
Medical expenses summary [EXCEL ↓](#)
Charitable donations/Political contributions [EXCEL ↓](#)
Information about a leased dwelling - QC (RL31)
Educator school supplies
Support payment to ex-spouse
2023 Notice of Assessment (Federal and QC)

SELF-EMPLOYED

Commission income or professional fees (T4A, RL1)
Business income and expenses [EXCEL ↓](#)
Professional dues
Vehicle expenses [EXCEL ↓](#)
Vehicle purchase/rental contract
Business-use-of-home expenses [EXCEL ↓](#)
CEBA loan repayment

POST-SECONDARY STUDENT

RESP educational assistance payments (T4A, RL1)
Scholarships (T4A, RL1)
Post-secondary tuition fees (T2202, RL8)
Interest paid on student loans

OTHER INCOME

Employment insurance or QPIP (T4E, RL6)
Wage-loss replacement plan benefits (T4A, RL1)
Workers' compensation benefits (T5007, RL5)
Social assistance payments (T5007)

RENTAL PROPERTY

Rental income and expenses [EXCEL ↓](#)
Purchase of real estate [EXCEL ↓](#)
Sale of real estate [EXCEL ↓](#)

Instalments paid for 2024 (Federal and QC)
Sale of real estate (principal residence, cottage) [EXCEL ↓](#)
Expenses to make your home safer and more accessible (65 years +, disabled, caregiver)
Multigenerational home renovations
Disability tax credit certificate (T2201, TP-752)
Caregiver credit

**ANY PAYMENT TO THE CRA OR REVENU QUÉBEC EXCEEDING \$10,000
MUST NOW BE MADE ELECTRONICALLY.**

DEPOSIT OF DOCUMENTS

NEW

You are self-employed, own a rental property or have a large file? You can now book your tax appointment through [Mélanie's online calendar](#)

PLEASE USE ONLY 1 METHOD TO SUBMIT YOUR DOCUMENTS

SECURE PORTAL



1. Complete the [identification questionnaire \(PDF\)](#).
2. Use our [different forms](#) to compile your medical expenses, donations, business or rental property expenses.
3. Access your secure portal from the [Client access](#) button on our website.
4. Create a folder per family member under the section "DROP DOCUMENTS HERE".
5. Deposit your documents in a **single upload**, once you have ALL your documents in hand.
6. It is **very important** to notify us by email at info@leclairduperre.com when your file is complete and ready to be processed.
7. We will contact you within the next 5 business days for a telephone interview.

SECURE EXTERIOR MAILBOX



1. Complete the [identification questionnaire \(PDF\)](#).
2. Use our [different forms](#) to compile your medical expenses, donations, business or rental property expenses.
3. Insert your documents in an identified envelope (name and phone number). **Please keep your originals.**
4. Drop your envelope in our secure exterior box, available 24/7.
5. You can also deposit your documents at our office during opening hours.
6. We will contact you within the next 5 business days for a telephone interview.

IN PERSON APPOINTMENT



1. Make an appointment if you want an in-person client interview.
2. Complete the [identification questionnaire \(PDF\)](#).
3. Use our [different forms](#) to compile your medical expenses, donations, business or rental property expenses.
4. Prepare your file in advance to maximize your meeting time.
5. Bring ALL your documents to the meeting. **Please keep your originals if possible.**

SEND US YOUR DOCUMENTS AS EARLY AS MARCH 3,
ONCE YOU HAVE ALL YOUR SLIPS IN HAND!