



## Client Portal and DocuSign

Though we have always encouraged the use of our [client portal](#) in the past, we have enhanced our process by introducing DocuSign integration. With this electronic signature technology, sending and receiving your EFILE consent forms and other documents requiring signature has never been easier. **In addition, documents will be sent to you via our secure client portal exclusively.**

If you are not registered to our secure digital portal, you will soon receive an email from us asking you to create your account. Once you see an email inviting you to create a portal account, please follow the instructions set out therein as soon as possible to avoid the link expiring. If you are registered and use our client portal already, you may need to add your family members, detailed below.

If you have family members for whom Logan Katz prepares their tax return, we will also require them to have an active email linked to a portal to send electronic signature forms once we complete your and their tax returns.

To add family members to your portal, please click “my details” on the left-hand side of your portal account. From there please select “invite to portal” at the top of the page and add the details of your family member including their names and email. They will need to accept their invitation and follow a few registration steps.

Should you have any questions, please contact us at our new, dedicated email [address\\_help@logankatz.com](mailto:address_help@logankatz.com), where we promise to answer quickly and accurately.

Best Regards,

A handwritten signature in black ink that reads 'Logan Katz LLP'. The signature is written in a cursive, flowing style.

The Partners and Staff of Logan Katz LLP  
Chartered Professional Accountants



# PERSONAL TAX SEASON IS HERE!

*It's time to get ready to file your tax return! Indeed, personal tax season is already upon us, and Logan Katz is, once again, providing a checklist designed to assist you in compiling your information. The use of this checklist will improve our accuracy in preparing your return(s) and will also reduce turn-around time.*

**WE ASK THAT YOU KINDLY BRING YOUR COMPLETE INFORMATION TO US AS EARLY AS POSSIBLE, ONCE YOU ARE CERTAIN YOU HAVE RECEIVED ALL YOUR TAX SLIPS FROM THIRD PARTIES.** Should you bring your information to us after **Thursday, April 3, 2025**, we will not guarantee the completion of your tax return by the **Wednesday, April 30, 2025** filing deadline. Although we will accept your tax information, please note that we will not commence preparing any tax returns beyond **Thursday, April 17, 2025**.

Once your return is successfully E-filed, an electronic copy of your tax return(s) will be made available to you. ***If you prefer a "paper copy" of your return(s) and related documents, please note that there may be an additional fee of \$100 included on your invoice.*** Further, if you wish us to return your tax information to you by courier, please indicate on our checklist a courier address where your copy can be sent. Please note that in certain situations, a paper return will be required to be filed by mail to the Canada Revenue Agency (CRA), in which case we will prepare a "tax copy" for you to mail to the CRA.

***The CRA is implementing mandatory direct deposit for all refunds that it issues to taxpayers and will be phasing out cheques issued by mail. If you are not already signed up for this service, please refer to our instructions included herein.***

You will notice that the various schedules (business, rental, employment expenses, etc.) are in fillable Excel format, rather than Word documents. For all applicable schedules, please enter the appropriate information and email the completed schedules to us. Alternatively, the schedules are also available on the publications page of our website at: <https://logankatz.com/resources/#resourcepublications>. Select the applicable schedules in the document entitled **2024 CDN Personal Tax Information**, save them to your computer, complete them, and email them to us or upload them to our client portal.

We ask that you refer to the enclosed payment instruction in regards to the payment of our fees.

Extra copies of the checklist and schedules are available should you know of someone who would like Logan Katz to prepare his/her personal income tax return. Note the checklist is also available in PDF format on our website.

We appreciate your commitment to us and hope you value ours to you, and look forward to working with you!

LOGAN KATZ LLP  
CHARTERED PROFESSIONAL ACCOUNTANTS

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*Cette trousse est également disponible en français sur demande.*



YOUR NAME: \_\_\_\_\_

- 
1. **If this is the first year LOGAN KATZ LLP is preparing your return**, please provide copies of your 2022 and 2023 personal income tax returns, and related notices of (re)assessment.

**If you have decided that LOGAN KATZ LLP will not prepare your 2024 personal income tax return, kindly call Kim Bourgeois at (613) 228-8282, extension 131, to let us know.**

2. If you moved during the year, please provide your new full address, otherwise we will *assume* you have the same address as in 2023 (consider applicability of *Schedules A and G*):

\_\_\_\_\_  
No.      Street/Avenue/Road      Town/City      Province      Postal Code

3. How do you wish us to return your tax information? Please choose one of the following:

Pick up at Logan Katz LLP offices on Gurdwara Road      \*

Courier to address below (at your expense)

***\*If this information is not addressed and your original documents are not picked up within the timeframe communicated to you by our front office staff, we will send them to you by regular mail. However, if your information is too large to go by regular mail, it will be couriered to you at your expense.***

**If your return(s) has(ve) not been E-filed, it is YOUR responsibility to forward the "paper copy" to the CRA (and Revenu Québec) by the due dates. Please do not assume we will be doing this on your behalf, without making arrangements with us.**

If you have chosen to have your tax information returned to you by courier (marked "personal and confidential"), please provide a ***courier*** address. If you are not at home during the day, please provide your work or other address where you can receive the package personally. *A post office box number or rural route number is insufficient for courier purposes:*

\_\_\_\_\_  
No.      Street/Avenue/Road      Town/City      Province      Postal Code

4. Information on you, your spouse and your dependents:

a)	<b>Your Full Name</b>	<b>Your S.I.N.</b>	<b>Your Date of Birth</b>
	_____	_____	_____
	<b>Your Spouse's Full Name</b>	<b>Your Spouse's S.I.N.</b>	<b>Your Spouse's Date of Birth</b>
	_____	_____	_____

**OR** Income of your spouse if we do not prepare her/his tax return: \$ \_\_\_\_\_

Dependents - Full Name(s)	Dependents - S.I.N.(s)	Dependents - Date(s) of Birth	Dependents - Income Source and Amount
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____

b) Provide the details of any loans, dispositions, and gifts of property to children, spouse or other non-arms length persons (list and provide details of any loans or gifts of money or other property to persons related to you).

Name of Recipient	Nature of Loan or Gift	Amount
_____	_____	\$ _____

c) If you have T5 and/or T3 Slips in your and a child/grand-child's name, please let us know the way in which you would like the income to be allocated.

5. Please provide telephone numbers where we can reach you:

During the day _____	During evening/weekend _____
Fax number _____	E-Mail address _____

6. If your marital status has changed during 2024, please provide the following details (please differentiate between "married" and "common-law") **Note: A spouse includes a same-sex spouse**

_____	_____
Previous status	New status
_____	_____
Date of change	SIN of Spouse (if married or common-law, include SIN of new spouse)

7. Did you own or hold foreign property at any time in 2024 with a total **cost** of more than CAD \$100,000?

Yes \_\_\_\_\_ No \_\_\_\_\_

Examples: Foreign bank account; tangible property (real estate/equipment); interest in non-resident trust, including a foreign mutual fund trust; intangible property (rights to royalties, share of Canadian corporation deposited with a foreign broker, etc.); a debt (bond, note, debenture) owed or issued by a non-resident; shares in non-resident corporations. If you do not respond to this point, we will assume NO. Please note that there are substantial penalties for failing to report this information in your personal income tax return.

If you loaned or transferred funds or property to a non-resident trust or if you received funds or property from, or have been indebted to, a non-resident trust in which you had or will have absolute or conditional rights as a beneficiary, either directly or indirectly, in 2024, please provide full details and documentation. If you do not respond to this point, we will assume NO.

***(Note: There are substantial penalties for failing to report this information in your personal income tax return.)***

8. Please let us know if you have any objections to the CRA providing, over the next 12 months, your name, address, and date of birth to Elections Canada to help keep up to date your information currently on the National Register for Electors. **Failure to respond to this point will result in our assumption that you have no objections.**

For your convenience, we have the **LK Drop Box** as another way to bring us your personal income tax information, additional information or tax payments outside our regular business hours OR without needing to make an appointment.



The clearly marked **Drop Box** is conveniently located outside the main entrance to our offices, is accessible 24/7 and is as secure as handing your information to us personally.

## Direct Deposit Instructions

If you receive at least one of the following payments from the Canada Revenue Agency (CRA), you must sign up for direct deposit:

- > Income tax refund
- > Goods and Services Tax/Harmonized Sales Tax credit and any similar provincial/territorial payments
- > Canada Child Benefit and any similar provincial/territorial payments
- > Working income tax benefit
- > Deemed overpayment of tax

### HOW TO SIGN UP

#### Online

If you are registered for My Account, simply log on and following the instructions to sign up for direct deposit. If you are **NOT REGISTERED**, follow these steps:

1. Go to the My Account page on the CRA's website: <https://www.canada.ca/en/revenue-agency/services/e-services/digital-services-individuals/account-individuals.html> (*Tip: You will need your social insurance number, date of birth, current postal code, and tax returns - this year and last.*)
2. Select "Sign in to a CRA account"
3. There are two options for signing in:

#### Option 1 – Using one of our Sign-In Partners

Log in or register with the same sign-in information you use for other online services (for example, online banking). *Tip: This option means one less user ID and password to remember.*

#### Option 2 – Using a CRA user ID and password

Log in with your CRA user ID and password, or register.

#### By phone

To sign up for direct deposit or to change your account information, call **1-800-959-8281**. You will need your:

- > social insurance number
- > full name and current address, including postal code
- > date of birth
- > most recent income tax and benefit return, and information about most recent payments from the CRA
- > banking information: three-digit financial institution number, five-digit transit number, and your account number

#### By mail

Fill out the Canada direct deposit enrolment form at <https://www.canada.ca/en/revenue-agency/services/about-canada-revenue-agency-cra/direct-deposit.html> and mail completed form to the address indicated on the form.

## Required Information

### INCOME

employment	_____	T4 and/or T4A Slip
directors' fees	_____	T4 Slip or provide details
old age security pension	_____	T4A (OAS) Slip
Canada or Québec pension plan benefits	_____	T4A (P) Slip
other pensions or superannuations	_____	T4A Slip and/or T4RIF
scholarship, fellowship, bursaries, etc.	_____	T4A Slip
employment insurance	_____	T4E Slip
dividends	_____	T5 and/or T3 Slip
interest	_____	T5 and/or T3 Slip
RRSP withdrawal / RRIF income	_____	T4 RSP Slip and/or T4RIF
profit sharing income	_____	T4 PS Slip

### OTHER INCOME

compound Canada Savings Bonds	_____	series number of bonds
other bonds	_____	details of all bonds held
other investment income (losses)	_____	tax shelters, etc. (T5013, etc.)
rental income and expenses	_____	provide details by completing <i>Schedule C</i>
capital gains (losses)	_____	provide details by completing <i>Schedule A, slip (T5008)</i>
alimony or separation allowance	_____	provide name, address, and S.I.N. of payor
self employment (business, professional)	_____	provide details by completing <i>Schedule B</i>
self employment (farming)	_____	provide details by completing <i>Schedule F</i>
other income (tips, foreign source income, etc.)	_____	provide details
WSIB (workers compensation) or social assistance	_____	slips (T5007)
income outside Canada (even if cost is <u>below</u> \$100,000)	_____	provide details (source/amounts in foreign currency)
statement of contract income	_____	slips (T5018)
statement of government service contract payments	_____	slips (T1204)
fees for services	_____	slips (T4A)
2024 Ontario Senior Homeowners' Property Tax Grant received	_____	

***\*Canadian Emergency Response Benefit, Canadian Emergency Student Benefit, Canadian Recovery Benefit, Canada Recovery Sickness Benefit, Canada Recovery Caregiving Benefit***

## DEDUCTIONS

employment expenses:		signed copy of T2200 form and provide details by completing <i>Schedule D</i>
- automobile	_____	
- <b>home office*</b>	_____	<b>signed copy of T2200 form/T2200S form and provide details by completing <i>Schedule E</i> *</b>
- other	_____	signed copy of T2200 form and provide details
registered retirement savings plan (RRSP)	_____	receipts for contributions
	_____	Home Buyers' Plan ("HPB") withdrawals
	_____	Lifelong Learning Plan ("LLP") withdrawals
union or professional dues	_____	receipts or T4 slip
Ontario staycation tax credit	_____	attach receipts
Ontario Seniors' Public Transit Tax Credit	_____	attach receipts
tuition (available on most institutions' websites) **	_____	T2202A slip and/or tuition receipt**
interest paid on student loans (under the Canada Student Loan Act or provincial equivalent)	_____	amount and/or bank slip
child care expenses	_____	attach receipts ( <i>include: S.I.N. and address of child care provider; number of weeks, if for sleepover summer camps</i> )
allowable business investment losses	_____	amount invested, proceeds, details
moving expenses	_____	provide details by completing <i>Schedule G</i>
alimony or separation allowance	_____	details ( <i>incl. name and S.I.N. of recipient</i> )
interest expense/carrying charges on investments	_____	details of investments
medical expenses including insurance premiums and amounts reimbursed	_____	receipts, patient name, amounts for attendants, name of insurer
charitable donations	_____	official receipts (registered charities only)
federal and provincial political donations	_____	receipts
contribution to a Labour-Sponsored Fund	_____	official receipt (T5006)
Ontario Seniors' Public Transit Tax Credit	_____	<b>65 or over, provide monthly cost for the FULL YEAR</b>
First Time Home Buyers Credit	_____	address, acquisition date
let us know if you are a volunteer firefighter	_____	
eligible Educator School Supply Tax Credit	_____	attach eligible supplies expense certification (from your employer)
eligible expenses for Home Accessibility Tax Credit	_____	attach receipts
adoption in expenses	_____	details
other	_____	details
Digital News Subscription Tax Credit	_____	details

***Inform us of any special living conditions (e.g. providing support to an adult child or parent, etc.)***

***\* If you worked from home during the year due to Covid-19, please fill in Schedule E***

***\*\* More examination fees now qualify for the tuition amount. In addition, the minimum duration of courses taken at a university outside Canada has been reduced to three (3) consecutive weeks***



## Other Important Information

1. Did you make tax instalments in 2024? \_\_\_\_\_ If yes, provide summary of instalments
2. Details regarding rent or property taxes paid \_\_\_\_\_ Plus name of landlord or municipality
3. If you are claiming entertainment and promotion expenses as a deduction, please segregate the cost of meals, theater tickets, and sports events as you are only permitted to deduct 50% of the cost of these items incurred during the year. **Please also note that the cost of golf green fees is not deductible** (refer to *Schedule B*).
4. If you realized a capital gain/loss on the disposal of a capital asset (real estate, shares, other assets) during 2024, we need to know both the date of acquisition as well as the date of sale (please complete *Schedule A*).
5. If you purchased or leased an automobile during the year for which you are claiming employment or business expenses, please provide a copy of the purchase or lease contract (refer to *Schedule D*).
6. If you wish to donate part or all of your refund to the Ontario Opportunities Fund, to be applied to help reduce Ontario's deficit and debt, please provide an amount: \$\_\_\_\_\_. We will assume your answer is \$0 if you do not specifically address this question.
7. If you or one of your dependents is disabled, please provide a copy of Form 2201 - Disability Tax Credit Certificate.

## Disposition of Principal Residence

As you know, the sale of a principal residence (PR) in Canada is not subject to tax as it qualifies for the Principal Residence Exemption (PRE).

In the past, legislation required the disposition of a PR to be reported on a Canadian Personal Tax Return; however, CRA did not administratively enforce this requirement. As such, tax practitioners would typically not report the sale of PR's on personal income tax returns, without any consequences.

You are required – legally and administratively – to report the disposition of a PR on your personal income tax return AND to designate the PRE to the gain. Completion of Form T2091(IND) – *Designation of a Property as a Principal Residence by an Individual* is required. Failure to do so will result in the CRA denying the PRE on the disposition and, as such, assessing tax on the gain.

As a result of this very significant change, if applicable, please ensure you include all information in regards to the disposition of a PRE on Schedule A.

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PLEASE SEE THE FOLLOWING SCHEDULES A - G

(also found on our website <https://logankatz.com/resources/#resourcepublications>)

AND DETERMINE WHETHER THEY ARE APPLICABLE TO YOUR SITUATION.

FAILURE TO COMPLETE THE SCHEDULES WILL INCREASE FOLLOW-UP TIME AND COSTS TO COMPLETE YOUR INCOME TAX RETURN(S).

**Schedule A – Capital Gains (Losses)**

**(Please fill out excel spreadsheet on our website at <https://logankatz.com/resources/#resourcepublications>)**

Description of asset disposed of in 2024: \_\_\_\_\_

Date of acquisition: \_\_\_\_\_, 19\_\_ / 20\_\_

Date of disposal: \_\_\_\_\_, 2024

Original cost of asset \$ \_\_\_\_\_

Proceeds on disposal \$ \_\_\_\_\_

Outlays of cash upon disposal  
(i.e. broker, lawyer, other) \$ \_\_\_\_\_

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Description of asset disposed of in 2024: \_\_\_\_\_

Date of acquisition: \_\_\_\_\_, 19\_\_ / 20\_\_

Date of disposal: \_\_\_\_\_, 2024

Original cost of asset \$ \_\_\_\_\_

Proceeds on disposal \$ \_\_\_\_\_

Outlays of cash upon disposal  
(i.e. broker, lawyer, other) \$ \_\_\_\_\_

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Description of asset disposed of in 2024: \_\_\_\_\_

Date of acquisition: \_\_\_\_\_, 19\_\_ / 20\_\_

Date of disposal: \_\_\_\_\_, 2024

Original cost of asset \$ \_\_\_\_\_

Proceeds on disposal \$ \_\_\_\_\_

Outlays of cash upon disposal  
(i.e. broker, lawyer, other) \$ \_\_\_\_\_

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**REMINDER: Remember to please contact your financial advisor/broker as soon as possible to authorize them to provide Logan Katz LLP staff with any information we may be requesting when preparing your personal income tax return. It becomes extremely time-consuming to have to do this at the height of tax season, both for the accountant and for the broker. Also, please provide the following:**

**Name of Broker:** \_\_\_\_\_

**Telephone No:** \_\_\_\_\_

**Email address:** \_\_\_\_\_

**FAILURE TO PROVIDE COMPLETE INFORMATION WILL RESULT IN EXTRA FEES.**

**Schedule B – Statement of Net Business or Professional Income**

(Please fill out excel spreadsheet on our website at <https://logankatz.com/resources/#resourcepublications>)

Name of business: \_\_\_\_\_

Year ended: \_\_\_\_\_, 2024 Business number (if applicable) \_\_\_\_\_

**REVENUE** (Amount includes HST collected yes  no ) \$ \_\_\_\_\_

**EXPENSES** (Amounts include HST paid yes  no )

Advertising \$ \_\_\_\_\_

Meals and entertainment (limited to a 50% deduction) Gross \_\_\_\_\_ 50% \_\_\_\_\_

Bad debts \_\_\_\_\_

Insurance (identify life and disability insurance separately) \_\_\_\_\_

Interest, bank charges (note: interest and penalties for late taxes and source deductions are not deductible) \_\_\_\_\_

Business tax, fees, licenses, dues, memberships, subscriptions \_\_\_\_\_

Office \_\_\_\_\_

Supplies \_\_\_\_\_

Legal, accounting and other professional fees \_\_\_\_\_

Management and administration fees \_\_\_\_\_

Rent \_\_\_\_\_

Maintenance and repairs \_\_\_\_\_

Salaries \_\_\_\_\_

Property taxes \_\_\_\_\_

Travel \_\_\_\_\_

Telephone and utilities \_\_\_\_\_

Fuel costs (except for motor vehicles) \_\_\_\_\_

Delivery, freight, express \_\_\_\_\_

Motor vehicle (business portion only) (provide amount or complete *Schedule D*) \_\_\_\_\_

Other (please specify): \_\_\_\_\_

Premiums paid to a private medical plan \_\_\_\_\_

Opening inventory balance \_\_\_\_\_

Closing inventory balance \_\_\_\_\_

Home office expenses (Please complete *Schedule E*) \_\_\_\_\_

Capital expenditures: Furniture and Fixtures \$ \_\_\_\_\_

Vehicles **see (2)** \_\_\_\_\_

Computer equipment \_\_\_\_\_

Computer software \_\_\_\_\_

Other (please specify) \_\_\_\_\_

**Schedule B – Statement of Net Business or Professional Income (continued)**

- |   | <b>YES</b>               | <b>NO</b>                | <b>N/A</b>               |
|---|--------------------------|--------------------------|--------------------------|
| (1) Goods and Services Tax  |                          |                          |                          |
| Are you registered for HST?   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| If yes, do you collect and remit HST on all your revenue sources?             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| If no, identify sources which are not subject to HST (except interest): _____ |                          |                          |                          |
| Do you claim ITC's on HST paid on expenses?                                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| If yes, have you provided your expenses excluding the HST?                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| How often do you file? _____  |                          |                          |                          |
| Do you use the Quick Method?  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Please provide the following details [or provide a copy of your HST return filed for 2024]:

Revenues (excluding HST)	\$ _____
HST collected	_____
HST remitted to CRA (including instalments)	_____

- (2) For each vehicle purchased or leased during the year, it is extremely important that you provide the following:
- Make and year of vehicle;
  - Cost before HST, PST;
  - Amount of HST and PST;
  - Monthly payment amount;
  - Trade-in amount (if applicable);
  - Year and make of vehicle traded-in;
  - **If available, please provide the purchase or lease documents.**

- (3) If your business earns income from one or more web pages or websites, you are required to report the number of web pages or websites. In addition, you must list the URL addresses for the top five internet web pages or websites from which you generate income.

http:// \_\_\_\_\_  
http:// \_\_\_\_\_  
http:// \_\_\_\_\_  
http:// \_\_\_\_\_  
http:// \_\_\_\_\_

Percentage of your gross income from the web pages and websites: \_\_\_\_ %

- (4) Businesses whose physical activity is **construction** are required to report to CRA the name of, amount paid to, and identifier number (Business Number or S.I.N.) of their subcontractors. These should be recorded on Form T5018, under the **Contractor Reporting System**.
- (5) If your business has carried out activities in the United States, please provide details to your Logan Katz LLP preparer to determine whether U.S. filings are required and/or whether you should claim treaty protection under the Canada-U.S. Tax convention.
- (6) A self-employed taxpayer carrying on business may be entitled to various provincial tax credits. Provide details of any Apprentices or co-op students you have employed during the year.

**Schedule C – Statement of Net Rental Income**

(Please fill out excel spreadsheet on our website at <https://logankatz.com/resources/#resourcepublications>)

**(Please prepare one Schedule C for EACH property)**  
(Make copies as needed)

Address of rental property:

Rental income for the year \$ \_\_\_\_\_

Expenses:

Advertising \$ \_\_\_\_\_

Insurance \_\_\_\_\_

Interest \_\_\_\_\_

Office expenses (see "Tax Tip" on Schedule E) \_\_\_\_\_

Legal, accounting, other professional fees \_\_\_\_\_

Management and administration fees \_\_\_\_\_

Repairs and maintenance \_\_\_\_\_

Salaries, wages, and benefits \_\_\_\_\_

Property taxes \_\_\_\_\_

School taxes \_\_\_\_\_

Travel \_\_\_\_\_

Utilities \_\_\_\_\_

Motor vehicle expenses \_\_\_\_\_

Other (Please specify): \_\_\_\_\_

*Please provide a list of any improvements or assets purchased during the year.*

*If you purchased a new rental property during the year, it is extremely important that you provide the following:*

- Full address
- Cost (before HST) of the building and HST (you should also provide cost of land, separately)
- Percentage to be attributed to yourself, spouse, or other
- **If available, please provide the purchase documents**

*If the property was sold during the year, please provide the closing documents.*

**Schedule D – (Self-) Employment Expenses: Allowable automobile expenses**

(Please fill out excel spreadsheet on our website at <https://logankatz.com/resources/#resourcepublications>)

(if claimed on employment income, you must provide a Form T2200 signed by your employer)

For each vehicle, provide the following:

	Vehicle A	Vehicle B	Vehicle C
Make of automobile	_____ ,20	_____ ,20	_____ ,20
Date acquired	_____ ,20	_____ ,20	_____ ,20
Manufacturer suggested retail price (MSRP)	\$ _____	\$ _____	\$ _____
Number of <b>km</b> driven to earn self-employment income ( <i>you must exclude km's to/from your home</i> )	_____ km	_____ km	_____ km
Total <b>km</b> driven in the year	_____ km	_____ km	_____ km
<b>EXPENSES</b>			
Fuel	\$ _____	\$ _____	\$ _____
Interest and finance charges (certain limits apply)	_____	_____	_____
Insurance	_____	_____	_____
Licensing or registration	_____	_____	_____
Maintenance and repairs	_____	_____	_____
Leasing costs (certain limits apply)	_____	_____	_____
Other (please specify) _____	_____	_____	_____

For each vehicle purchased or leased during the year, it is extremely important that you provide the following:

- Make and year of vehicle;
- Cost before HST, PST;
- Amount of HST and PST;
- Trade-in amount (if applicable);
- Year and make of vehicle traded-in;
- For leased vehicles, the Manufacturers Suggested Retail Price (MSRP)
- **If possible, please provide a copy of the purchase or lease documents.**

Total amount reimbursed by employer for vehicle during year (N/A if self-employed) \$ \_\_\_\_\_

**REMINDER:** Remember that the CRA requires you to keep a detailed log outlining dates, number of kilometres, and destinations to allow for a deduction of vehicle expenses.

**Schedule E – (Self-) Employment Expenses: Work space in the home expenses**

(if claimed on employment income, you must provide a Form T2200 signed by your employer)

Area of house used for business purposes (square footage) \_\_\_\_\_

Total area of house (square footage) \_\_\_\_\_

Expenses:

Heat \$ \_\_\_\_\_

Hydro \_\_\_\_\_

Insurance \_\_\_\_\_

Repairs and maintenance \_\_\_\_\_

Rent \_\_\_\_\_

*OR*

Mortgage interest - exclude principal payments (if self-employed only) \*\* \_\_\_\_\_

Water \_\_\_\_\_

Property taxes \_\_\_\_\_

Other (Please specify): \_\_\_\_\_

**\*\* Please provide your mortgage statement for 2024,**  
if your financial institution has supplied this information.

***REMINDER: Remember that home office expenses can only be claimed if an area of your home is your principal place of business; or the space is used exclusively for the purpose of earning income from business, and is used on a regular and continuous basis for meeting the clients, customers or patients of your business.***

**TAX TIP:** According to a 2002 District Office Memo at CRA, it appears **home office expenses** can be claimed against rental income. Accordingly, if you are reporting rental income on schedule C of this package, we encourage you to complete this schedule as well.

**Schedule F – Statement of Net Farming Income**

(Please fill out excel spreadsheet on our website at <https://logankatz.com/resources/#resourcepublications>)

Revenues:

Wheat	\$ _____
Oats	_____
Barley	_____
Mixed grains	_____
Flaxseed	_____
Canola	_____
Soya beans	_____
Corn	_____
Fruits and vegetables (please specify)	_____
Forage crops	_____
Livestock	
- Cattle	_____
- Swine	_____
- Poultry	_____
- Sheep and lambs	_____
Eggs	_____
Milk and cream	_____
Custom & contract work & machine rental	_____
Patronage dividends	_____
Dairy subsidies	_____
Insurance proceeds	_____
Other (please specify): _____	_____
 Total income	 \$ _____



**Schedule F – Statement of Net Farming Income (continued)**

Expenses:

Building and fence repairs	\$ _____
Clearing or leveling, and draining Irrigation/drainage	_____
Containers, twine & bailing wire _____	_____
Crop insurance, GRIP, and stabilization premiums	_____
Machinery & truck expense	_____
- Gasoline, diesel fuel & oil	_____
- Repairs, license, insurance	_____
Insurance - building, livestock	_____
Interest on real estate mortgage	_____
Interest – other	_____
Motor vehicle expenses	_____
Property taxes	_____
Rent (land, buildings, pasture)	_____
Salaries (including CPP, QPP, EI, WSIB)	_____
Custom & contract work & machine rental	_____
Freight & trucking	_____
Electricity	_____
Feed, supplements, straw, bedding	_____
Fertilizers & lime	_____
Heating fuel	_____
Livestock purchased	_____
- Cattle	_____
- Swine	_____
- Poultry	_____
- Sheep and lambs	_____
Herbicides, pesticides, insecticides, fungicides	_____
Seeds and plants	_____
Veterinary fees, medicine & breeding fees	_____
Small tools	_____
Accounting, legal, office, advertising, memberships and subscriptions	_____
Telephone	_____
Other (please specify): _____	_____
Total expenses	\$ _____
Fair market value of inventory at December 31, 2024	\$ _____

**Schedule G – Schedule of Moving Expenses**

(Please fill out excel spreadsheet on our website at <https://logankatz.com/resources/#resourcepublications>)

**Criteria:** Must have moved at least 40 Km to earn employment or self-employment income or to study in an educational institution.

	Former address in full	New address in full
Address		
City, Prov.	_____	_____
Postal Code	_____	_____
Date of move:	_____, 2024	
	Former employer, business or educational institution	New employer, business or educational institution
Name	_____	_____
Address	_____	_____
City, Prov.	_____	_____
Postal Code	_____	_____

Distance from former residence to new work or study location	_____ Km
Distance from new residence to new work or study location	_____ Km

**Costs:**

Moving of household effects (mover: _____)	\$ _____
Transportation costs from former residence to new residence (Mode of travel: _____)	_____
Travel costs (# of km: _____)	_____
Lodging (# of nights: _____)	_____
Meals (# of days: _____)	_____
Temporary living expenses near new or old location (max. 15 days)	
Lodging (# of nights: _____)	_____
Meals (# of days: _____)	_____
Cost of lease settlement	_____
Selling costs of former residence (selling price: \$ _____)	
Real estate commission	_____
Legal or notarial fees	_____
Advertising	_____
Other (please specify): _____	_____
Purchase costs of new residence	
Legal fees	_____
Taxes (registration or transfer of title)	_____
Total expenses	\$ _____
Amount reimbursed by employer (if Nil, please state)	\$ _____