

2025 PERSONAL TAX INFORMATION CHECKLIST

1. PERSONAL INFORMATION *please note any changes from prior years for returning clients*

Name (first, middle, last) _____

Marital Status _____ Spouse Name (first, middle, last) _____

Address _____

City / Province / Postal Code _____

Telephone (H) _____ (C) _____

Email (H) _____

SIN _____ Spouse SIN _____

Birthdate _____ Spouse Birthdate _____

- Did you move during the year? [yes/no] ____
- Do you authorize CRA to provide your name, address and date of birth to Elections Canada for the purpose of updating the National register or Electors? [yes/no] _____
- Do you or your spouse own foreign property costing more than \$100,000 CNS? [yes/no] _____

2. DEPENDENTS [children and others dependent on you for financial support]

Name	Relationship	Birthdate [dd/mm/yy]	Net Income [line 23600]*	SIN

* provide details of income only if I am not preparing the tax return

3. INFORMATION SLIPS

These are the standard prescribed forms on which income is reported

		Attached
Employment Income	T4	_____
Director's Fees / Pension / Annuity / Commission Income	T4A	_____
Employee Profit Sharing	T4PS	_____
Canada Pension Plan	T4A(P)	_____
Old Age Security	T4A(OAS)	_____
Income from RRSP or RRIF	T4RSP, T4RIF	_____
Employment Insurance Benefit	T4E	_____
Interest & Dividend Income	T5	_____
Mutual Funds and Other Trusts	T3	_____
Worker's Compensation / Social Assistance	T5007	_____
Purchase / Sale of Securities	T5008	_____
Partnership Income	T5013	_____

4. OFFICIAL RECEIPTS / DOCUMENTS

Please provide the original receipts / forms received for these deductions / credits

		Attached
RRSP Contributions		_____
Charitable Donations		_____
Political Donations		_____
Professional / Union Dues		_____
Disability Tax Credit – if new this year	T2201	_____
Medical Expenses [including premiums, nursing, and home care]		_____
Tuition Fees*	T2202/2202A	_____

* Dependent must sign the form if the credit is being transferred to a supporting person

5. INVESTMENTS

		Attached
Amount paid to earn income from investments including accounting and investment counsel		_____
Gains / Losses from selling securities or other capital property		_____
For example: stocks, bonds, mutual funds, real estate (including statements of trading summaries, original cost and transaction fees)		_____
Rental Properties		
Detailed listing of income and expense on a property by property basis (indicate ownership split)		_____
Foreign Property		
Details regarding your interest in all properties held outside Canada, including bank accounts, investments, securities, trusts and real estate		_____

6. OTHER DEDUCTIONS / TAX CREDITS

		Attached
Childcare Expenses		
Amounts paid as well as name and SIN of all individuals providing care		_____
Alimony, Maintenance or Child Support		
All amounts paid or received in the year and name and address of recipient, if applicable		_____
Income Tax Instalments		
Details regarding payments; includes recent Revenue Canada Statement of Account		_____
Other Items – Please provide complete details		
Home Buyer Plan withdrawals		_____
Lifelong Learning Plan withdrawals		_____
Moving expenses		_____
Legal fees		_____
Property taxes or rent		_____
Interest paid on student loans		_____

7. ALSO INCLUDE

- Prior year Notice of Assessment / Reassessment
- Copy of prior year Personal Tax Return with carry forward data (if you are a first year client)