

2025 Personal Tax Checklist

Client Name: _____

E-mail Address: _____

- Sign me up for the newsletter
- I prefer to be contacted through e-mail rather than physical correspondence

Address: _____
Street Address Prov. Postal Code

Phone: _____ Cell: _____ Work: _____

Birth date: _____

S.I.N.: _____ Marital Status: _____

Dependents

Name	S.I.N	Birth date	Net Income (if applicable)
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

INCOME

Personal Income

- T4, T4A – Salaries and Employment Income
- Other Employment Benefits
- T4A (P) – CPP Benefits
- T4(OAS)- Old Age Security Benefits
- T4A – Other Pensions or Superannuation
- T4RIF – RRIF Income
- T4E – Employment Insurance Benefits
- T5007 – Social Services Benefits
- T11137 – Statement of Account – Home Buyer’s Plan
- T4RCA – Retirement Income

Investment Income

- T3, T5, T4PS – Interest and Dividends
- T5008 – Statement of Security Transactions
- Interest on 2025 Tax Refund
- T6000 – Canada Savings Bonds
- T3 – Income from Mutual Funds
- Annuities
- Rental Income*
- T5013 – Net Partnership Income (Loss) any Limited Partnership
- Capital Gain/Losses (Full details required)



Registered Professional Accountant

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Other Income

- Alimony Received
Taxable Child Support Received
Scholarship/Bursaries
Professional Earnings

Business

- Employment Earnings
Farming/Fishing Earnings
Other - Specify
Self-Employed Commission earnings *

Non-Refundable Credit

- Married Amount - Spouse's Net Income \$
Equivalent to Married Amount
Disability Deductions (Full details required)
T2202 - Tuition Fees/Education Credit
T2202 - Tuition Fees/Education Credit for Dependent
Dependent's Net Income \$
Interest Paid on Student Loans
Medical Receipts
Charitable Donations
Dependent Data (For GST Credit and Child Tax Benefit)

Other Deductions

- RRSP Receipts
Union, Professional Dues
Alimony Paid
Deductible Child Support Paid
Safety Deposit Box Charges
Interest Carrying Charges on Investments
Investment Counsel and Accounting Fees
Employment Expenses *
E.I. Repaid
Deductible Legal Fees
T2200 Declaration of Condition of Employment*
TL2 - Claim for Board & Lodging Expenses
Child Care Expenses (Full details required)
Moving Expenses (Full details required)
Allowable Business Investment Loss
Restricted Farming Losses Carry Forward
Capital Losses Carry Forward
Non-Capital Losses Carry Forward
Attendant Care Expenses
Limited Partnership Losses of Other Years

OTHER INFORMATION

- 2024 Notice of Assessment
Summary of 2025 Installment Payments
Details on Foreign Property held in 2025 where total cost exceeded \$100,000 Cdn - This includes foreign shares held in Canadian trading accounts

Please use this space to provide any additional information or notes.

Horizontal lines for providing additional information or notes.