



2025 Personal Tax Return Checklist

Name(s) _____

Address _____

Email _____ Phone (cell/home) _____

Email _____ Phone (cell/home) _____

Email _____ Phone (cell/home) _____

Email _____ Phone (cell/home) _____

For your 2025 tax return would you like to:

- Sign your tax return electronically (*does not require printer/scanner*) Yes No
- Receive a copy of your tax return electronically Yes No

If you answered yes, please provide an email address and cell phone number for each person filing

Please answer all questions and provide details:

Details/additional information

Did your marital status change in 2025
(including common law)? Yes No _____
(Please provide a copy of any applicable agreements)

Do you have any new dependants? Yes No _____

Are you a Canadian Citizen? Yes No _____

Do you want your name, address, and date of birth
provided to Elections Canada? Yes No _____

Did you own any foreign property at any time in
2025 (e.g. foreign investments, real estate, etc.)? Yes No _____

INCOME:

Have you provided us with all of the T4,
T5 and/or T3 slips that you expect to receive? Yes No _____

Did you sell any stocks or bonds? Yes No _____

Did you sell any real estate (other than your home)? Yes No _____

Did you buy a new home? Yes No _____

Did you sell your principal residence? Yes No _____
*(Please provide: address, year of acquisition,
original purchase price, proceeds of disposition)*

Did you have any new sources of income in 2025 Yes No _____

PLEASE SEE THE BACK OF THIS FORM FOR ADDITIONAL QUESTIONS AND TO ADD ANY OTHER INFORMATION



DEDUCTIONS AND CREDITS:

| | | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------|-------|
| Did you make an RRSP contribution for 2025? | Yes <input type="checkbox"/> No <input type="checkbox"/> | _____ |
| Did you pay any tax installments? | Yes <input type="checkbox"/> No <input type="checkbox"/> | _____ |
| Did you work from home during 2025? | Yes <input type="checkbox"/> No <input type="checkbox"/> | _____ |
| Did you pay rent in 2025? <i>(Please provide the name of your landlord, rent paid and number of months you rented in 2025)</i> | Yes <input type="checkbox"/> No <input type="checkbox"/> | _____ |
| Did you open or contribute to a First Home Savings Account in 2025? | Yes <input type="checkbox"/> No <input type="checkbox"/> | _____ |
| Are you an apprentice? | Yes <input type="checkbox"/> No <input type="checkbox"/> | _____ |
| Interest paid on loans used for investing | Yes <input type="checkbox"/> No <input type="checkbox"/> | _____ |
| Investment management fees <i>(Doesn't apply to fees on RRSP, RRIF or TFSA accts)</i> | Yes <input type="checkbox"/> No <input type="checkbox"/> | _____ |
| Union dues | Yes <input type="checkbox"/> No <input type="checkbox"/> | _____ |
| Tuition fees (yourself or dependant) <i>(Please have student sign before bringing in)</i> | Yes <input type="checkbox"/> No <input type="checkbox"/> | _____ |
| Moving expenses | Yes <input type="checkbox"/> No <input type="checkbox"/> | _____ |
| Employment expenses, including work from home <i>(Please provide a completed form T2200)</i> | Yes <input type="checkbox"/> No <input type="checkbox"/> | _____ |
| Spousal support | Yes <input type="checkbox"/> No <input type="checkbox"/> | _____ |
| Childcare (daycare, day camps) | Yes <input type="checkbox"/> No <input type="checkbox"/> | _____ |
| Donations/political contributions | Yes <input type="checkbox"/> No <input type="checkbox"/> | _____ |
| Medical expenses (including travel) <i>- If possible, please obtain a summary of prescriptions for the year from your pharmacy</i> | Yes <input type="checkbox"/> No <input type="checkbox"/> | _____ |
| Do you pay premiums for a private medical plan? | Yes <input type="checkbox"/> No <input type="checkbox"/> | _____ |
| Trades person's tool expenses <i>(minimum of \$1,471)</i> | Yes <input type="checkbox"/> No <input type="checkbox"/> | _____ |
| Volunteer firefighter's amount | Yes <input type="checkbox"/> No <input type="checkbox"/> | _____ |
| If you have a short-term vacation rental property (Airbnb, VRBO, etc.), are you in full compliance with municipal, provincial and federal rules and regulations with respect to short-term vacation properties? | Yes <input type="checkbox"/> No <input type="checkbox"/> | _____ |

ADDITIONAL INFORMATION:
