



# 2025 Tax Checklist

## Your information

Full Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 DOB \_\_\_\_\_  
 \_\_\_\_\_  
 (SIN) \_\_\_\_\_ Phone number \_\_\_\_\_  
 \_\_\_\_\_  
 Marital status \_\_\_\_\_ Residency Status \_\_\_\_\_  
 \_\_\_\_\_  
 Email address(es) \_\_\_\_\_

## Family Information (if not provided in previous years)

Name / SIN / Birthdate / Relationship  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Deliver completed tax returns by:  Email (via ShareFile)  
 Paper (extra charge of \$20 per return)

## SLIPS AND RECEIPTS PROVIDED:

- |  |   |
|--|---|
| <input type="checkbox"/> T4, T5, T3, T4A, T4E                                    | <input type="checkbox"/> Professional fees invoices (other than mine)       |
| <input type="checkbox"/> T3 slips still to come - will be provided once received | <input type="checkbox"/> Investment counsel fees                            |
| <input type="checkbox"/> T4OAS, T4P (CPP)  | <input type="checkbox"/> Tuition receipts (T2202A)                          |
| <input type="checkbox"/> T4RSP, T4RIF (RSP / RIF withdrawals)                    | <input type="checkbox"/> Medical / Dental and Disability expenses           |
| <input type="checkbox"/> Partnership income (T5013)                              | <input type="checkbox"/> Child care (including name and S.I.N. of provider) |
| <input type="checkbox"/> RRSP contributions                                      | <input type="checkbox"/> Alimony / Maintenance payments (if deductible)     |
| <input type="checkbox"/> Union / Professional dues                               | <input type="checkbox"/> Moving expenses summary                            |
| <input type="checkbox"/> Charitable / Political donations receipts               |   |

## CAPITAL GAINS/LOSSES:

### Share dispositions in 2025

- "Capital Gain and Loss Report" from your broker  
 Without the above report, I will need the original  
 purchase price of any shares which were sold in 2025
- Selling expenses (i.e., broker's commission)

### Other capital property disposed of in 2025

- A brief description of property
- Details of real estate sales and purchases
- Gross proceeds of sale and **date** of sale
- Original cost and date acquired

## PROVIDE THE FOLLOWING WHERE APPLICABLE:

- |   |   |
|---|---|
| <input type="checkbox"/> Self-employed / Business summary                     | <input type="checkbox"/> 2025 installments paid \$ _____            |
| <input type="checkbox"/> Rental summary                                       | <input type="checkbox"/> Foreign income and expenses and taxes paid |
| <input type="checkbox"/> Deductible employment expenses (Form T2200 required) | <input type="checkbox"/> RRSP Home Buyers Plan (T1036)              |

## MANDATORY QUESTIONS:

- Yes  No Do you authorize your name, address, date of birth and email to be provided to Elections Canada?
- Yes  No Did you own foreign property at any time in 2025, with a total cost of more than \$100,000 Cdn.? If yes, please provide details. (This excludes personal use vacation properties)
- Yes No Did you sell your principal residence in 2025?
- Yes No Did you open a First Home Saving Account, FHSA, in 2025?
- Yes No Did you own an interest in a foreign affiliate at any time in 2025?

Please don not forget to sign and submit 2025 engagement letter (from website)