

2025 PERSONAL INCOME TAX ORGANIZER

Name: _____

- | | Tick if
<u>Applicable</u> |
|---|------------------------------|
| Bring details, official receipts, and all tax slips as applicable, for the following items: | |
| 1. Employment income (T4), commissions, tips, Employment Insurance benefits (T4E) | _____ |
| 2. Pension income, RRIF, annuity, CPP, Old Age Security, disability benefits or profit share (T4A, T4RIF, T4RSP, T4A(P), T4A(OAS), T4A(RCA), T4PS) | _____ |
| 3. Income from mutual funds, estates, trusts or RESP's (T3), partnership (T5013) or joint ventures (F/S) | _____ |
| 4. Interest, dividend & other investment income (T5, T5008 and tax reporting package from broker) | _____ |
| 5. Other: RRSP withdrawal (T4RSP); foreign income (incl. support for tax assessed & paid); WCB & social assistance (T5007); RESP withdrawal, scholarship, grant, bursary or severance (T4A) | _____ |
| 6. Summary of income and expenses from rental property, farming or self-employment | _____ |
| 7. Capital gains & losses. If you sold funds, stocks, options, precious metals, cryptocurrency, real estate or tax shelters, bring details regarding the original purchase (in CAD) and sale, including selling costs | _____ |
| 8. Details regarding a disposition of a personal residence, including years of ownership, proceeds of sale, and # of years 'designated' as principal residence. Costs of purchases/improvements may be required. | _____ |
| 9. Details of foreign property owned at any time during 2025, if your share of original cost > \$100k CAD | _____ |
| 10. Support payments received or paid with respect to child(ren) &/or former spouse | _____ |
| 11. If you received salary/ commission and were required to pay expenses (auto, home office, or other) provide a list of expenditures and the mileage log (employer signed T2200 required) | _____ |
| 12. RRSP/FHSA contributions. If applicable, include details of Past Service Adjustment Reversal, Home Buyer Plan, Lifelong Learning Plan or First Home Savings Account (FHSA). | _____ |
| 13. Union dues, professional dues, and tuition fees (T2202) | _____ |
| 14. Details of moving expenses and addresses, if you moved at least 40 km closer to new work or school | _____ |
| 15. Child care & overnight camp fee receipts (name of provider, amount paid, SIN if paid to an individual) | _____ |
| 16. Carrying charges (interest paid to earn taxable investment income, investment management fees) | _____ |
| 17. Spouse/common law & children details (full names, birthdates, line 23600 net income, their tuition slips) | _____ |
| 18. Any change regarding address, marriage, separation, birth, death, emigration/immigration – contact us! | _____ |
| 19. Medical/dental expenses & private plan premiums paid for your spouse and dependants | _____ |
| 20. Multigenerational home renovation tax credit (MHRTC) – Up to \$50,000 of qualifying expenditures (date, vendor, HST number, description and amount) | _____ |
| 21. Charitable donations and political donations (must provide official receipts) | _____ |
| 22. Caregiver credit if support dependent with physical/mental impairment (specify their age, relationship to you, and their 2025 net income) | _____ |
| 23. Interest paid on student loans (provide statement of interest paid) | _____ |
| 24. Quebec residents: provide municipal tax bill (or RL-31 slip), a VOID cheque (if not registered for direct Deposit for Solidarity Credit) and confirmation of whether you have private drug insurance | _____ |
| 25. Ontario residents: 2025 property tax or rent paid in the year | _____ |
| 26. Federal (and Quebec, if applicable) income tax instalment payments. Bring the statement you received in February 2026 showing the instalment payments made in 2025 | _____ |
| 27. 2024 Notice of Assessment from CRA and (if Quebec resident) Revenu Quebec
New clients, please provide your complete 2024 tax return (including schedules) | _____ |