



2025 PERSONAL INCOME TAX CHECKLIST

PERSONAL INFORMATION:

Please complete or provide any updates

	YOU	SPOUSE
Name:		
Date of birth:		
Marital status:		Date of change during 2025, if applicable:
Address:	<input type="radio"/> New Address	
E-mail addresses:		
Phone Numbers		
Dependants	Please provide separately: Names, social insurance numbers, birth dates and net income of all dependants.	

GENERAL INFORMATION:

- Are all individuals Canadian citizens? YES ☐ NO ☐
- Who should we contact with questions about your tax information? _____
- Is there a date after which you will not be available to sign your return? _____
- Do you hold investments or rental properties outside Canada with an aggregate cost in excess of \$100,000 CDN? YES ☐ NO ☐
- Do you require any printed copies the completed Canadian income tax returns?
YES ☐ NO ☐

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INCOME INFORMATION:

EMPLOYMENT/OTHER INCOME

- Income slips (T3, T4, T5, T4A, T4AP, T4E, T4RSP, T4RIF, T4AOAS, T4PS, T5007, T5013, RC62)
- Stock option / benefit plan statements from employer

INVESTMENT INFORMATION

- Annual investment statements for all funds held outside your registered accounts (other than RRSP, RRIF, RESP, TFSA)
- Details of all investment disposals during 2025, including information to support original purchase price (cost base)
Details of investments that were subject to 1994 capital gains election, if any

RENTAL INCOME

- Full address, number of rental units
- Revenue and expenses, including mortgage interest, property tax, repairs, insurance, utilities, condo fees
- Percentage of personal use, if applicable
- Details of any capital improvements (eg. renovations, roof replacement, appliance purchases)
- If bought or sold in 2025, provide purchase/sale agreement, statement of adjustments, reporting letter from lawyer and allocation of value between land and building
- If short term rental, confirmation that the property is considered compliant with registration, licensing, and permit requirements

SELF-EMPLOYMENT INCOME

- Revenue for the year (on an accrual basis)
- HST returns and instalments paid, if applicable, for the year
- Confirm method of accounting for HST (regular or quick method)
- Details of capital asset additions relating to self-employed business



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EXPENSES:

Self-employment, Employment or Commission

- T2200 - Conditions of Employment form signed by employer
- Meals and entertainment
- Travel, promotion, conferences, dues, telecommunications, supplies, etc.
- Automotive - KM driven for business AND total KM driven per year, operating expenses, lease terms, loan interest, purchase/sale price if bought/sold in 2025
- Office-in-home - percentage used for business, rent, mortgage interest, property taxes, condo fees, utilities, insurance

DEDUCTIONS:

- RRSP receipts
- First Home Savings Account (FHSA) contributions to Dec 31, 2025
- Child care, with supporting receipts **and** SIN of caregiver
- Union/membership dues
- Moving expenses (contact us for detailed list)
- Alimony/support payments, with copy of agreement if not previously provided
- Legal fees to collect salary, alimony, support
- Accounting fees, investment counsel fees
- Investment/business interest expense
- Tax shelter deductions - tax slips and tax reporting package
- Trades people's tools



Deadline Dates 2026

- Jan 30:** Interest payment on inter-spousal loans
- Mar 2:** Filing of 2025 T4, T4A, T5 slips and summaries 2025
- Mar 2:** RRSP contributions including annual repayment of RRSP Home-Buyers withdrawal)
- Mar 15:** First personal tax instalment for 2026
- Mar 31:** T3 slip and T3 trust return for calendar year end trusts
- T1-OVP form to report penalty on excess RRSP contributions for 2026
- April 30:** 2025 T1 personal income tax return (if not self employed) **and** payment of any outstanding tax balance (whether self employed or not)
- Jun 15:** Second personal tax instalment for 2026
- Jun 15:** 2025 T1 personal income tax return, if self-employed

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TAX CREDITS:

- ☐ Charitable and political donation receipts
- ☐ Medical/dental/attendant care expenses
- ☐ Tuition fee receipt (T2202) for self, or with dependent's income and signatures
- ☐ Disability credit form (T2201) for self or dependents for first-time claims
- ☐ Student loan interest statement
- ☐ Adoption costs
- ☐ Fertility treatment costs
- ☐ Names and birthdates for children under age 18
- ☐ For seniors or disabled individuals residing on their own, or with family members, receipts for home renovations to improve accessibility
- ☐ Receipts for public transit costs in Ontario for seniors
- ☐ Indicate if eligible for first-time home buyer credit for 2025
- ☐ Indicate if infirm family member (other than child) resides with you or is dependent on you, along with dependent's net income
- ☐ For teachers, eligible teaching supplies bought during 2025
- ☐ Maximum employment deduction for tradespeople/apprentice mechanic tool expenses
- ☐ 2025 rent/property tax information if eligible for Ontario tax credits

MISCELLANEOUS:

- ☐ 2024 notice of assessment/reassessment (if not already sent to us)
- ☐ 2025 tax instalment summary
- ☐ If new personal tax client, copy of 2024 return, and carry forward details such as donations, losses, RRSP contributions, etc.
- ☐ If principal residence was sold during 2025, provide description of the property, sale proceeds and the year purchased

TAX DROP OFF LOCATIONS

(No appointment required for drop off)

Ottawa: 2283 St. Laurent Blvd, Suite #302, Ottawa, ON K1G 5A2 (613-828-6955)

Kemptville: 139 Prescott Street, Unit B, Kemptville, ON K0G 1J0

Dymon Storage office (drop off only): 300 Greenbank Road, Ottawa, ON K2H 0B6

CrossPoint Financial (drop off only): 2650 Queensview Drive, Suite #110, Ottawa, ON K2B 8H6 (call 613-828-6955 for hours)