

It will soon be time to prepare your 2025 tax return. Providing complete and accurate information will allow us to prepare your tax return in a timely manner. Please review the attached questionnaire, note any changes and indicate which items you are supplying.

Mandatory electronic filing

The Canada Revenue Agency (CRA) requires approved tax preparers to file tax returns electronically. Your tax return will be transmitted to the CRA. Please answer the related questions on the checklist.

Reporting the sale of your principal residence

All taxpayers who sell their home must report the sale on their tax return, even if it was their principal residence for the whole time they owned it. There are substantial penalties for not reporting the sale. If you sold your home in 2025, provide the details on the attached questionnaire.

Foreign property disclosure

Canadian resident individuals who held property outside Canada with a total cost of more than 100,000 CAD at any time in the tax year must report it to the CRA. There are substantial penalties for non-compliance. Please complete the attached questionnaire.

Important dates

March 2, 2026	Final date for 2025 RRSP contributions
March 15, 2026	Payment due date for first quarterly 2026 tax instalment
April 30, 2026	Payment due for 2025 taxes owing
April 30, 2026	Filing due date for your 2025 income tax return

2025 Tax Information Checklist

Contact Information

Legal name: _____

Preferred name: _____

Address: _____

Mobile: _____

Home: _____

Work: _____

Email: _____

Marital status: _____

Dependants

Name, date of birth and SIN of any dependants:

Did you receive or make support payments during the year?

☐ Yes

☐ No

Are you a Canadian Citizen?

☐ Yes

☐ No

Do you agree to Canada Revenue Agency providing your name, address, and date of birth to Elections Canada for the National Register of Electors?

☐ Yes

☐ No

Do you have income that is exempt under the Indian Act?

☐ Yes

☐ No

Sale or Disposition of a Principal Residence or Other Real Property

Did you sell or dispose of your principal residence this year?

☐ Yes

☐ No

Did you sell or dispose of any other real property (cottage, vacation home, vacant land, etc.)?

☐ Yes

☐ No

Complete address of the property sold, including postal code (attach additional page, if required):

Year purchased: _____

Sale price: _____

Foreign Pensions

Did you receive a pension from a country other than Canada?

☐ Yes

☐ No

If yes, provide the following details for each pension received (attach additional pages, if required)

Country: _____

Amount: _____

Exempt portion: _____

Currency: _____

Start date: _____

Foreign taxes paid: _____

Tax on Split Income Requirement

Did you receive any of the following types of income from a private business, activity or profession where a related person who is resident in Canada has a significant interest or is actively involved:

Dividends or shareholder benefits from a private corporation

☐ Yes

☐ No

Partnership or Trust income from a related business

☐ Yes

☐ No

Rental income (including through a trust or partnership) where a related person is involved

☐ Yes

☐ No

Interest on loans to a private corporation, partnership or trust

☐ Yes

☐ No

Income or gains from the disposition of private shares or other property

☐ Yes

☐ No

Crypto-assets and Crypto-asset Transactions

Did you hold any crypto-assets or conduct any crypto-asset transactions?

☐ Yes

☐ No

2025 Supporting Documentation

Notices

☐ Notice(s) of (re)assessment for 2024

Other income or new sources of income

☐ First year for CPP, OAS?

☐ T4E for employment insurance payments

☐ Alimony and/or maintenance received

☐ Rental property revenue and expenses

☐ Business, self-employed income and expenses

☐ Details of foreign income or other pensions received (see previous page)

Receipts

☐ RRSP contributions and withdrawal

☐ Union or professional dues

☐ Donations

☐ Medical expenses, including plan premiums

☐ Child care

- ☐ Student loan interest
- ☐ T2202 tuition fees
- ☐ Moving expenses
- ☐ Digital news subscriptions
- ☐ T2200 Employment expenses
- ☐ Investment expenses (interest, management fees)
- ☐ Alimony and/or maintenance paid

Slips from the following issuers (if applicable to 2025)

2025 Foreign Property Reporting

Canadian resident individuals who held certain property outside Canada with a total cost of more than \$100,000 CAD at any time during the tax year are subject to certain disclosure requirements to the Canada Revenue Agency (CRA).

Non-compliance with this reporting requirement results in severe penalties. To help us determine whether you are subject to the reporting rule, please read and consider each of the following questions carefully when answering them.

If you owned any of the following property at any time during the year, answer YES to the relevant questions. You may be subject to the foreign property reporting rule, and we may prepare additional forms to submit to the CRA.

Funds or intangible property (patents, copyrights, etc.) situated, deposited or held outside Canada.

- ☐ Yes
- ☐ No

Tangible property situated outside of Canada.

- ☐ Yes
- ☐ No

A share of the capital stock of a non-resident corporation held by the taxpayer or by an agent on behalf of the taxpayer.

☐ Yes

☐ No

An interest in a non-resident trust that was acquired for consideration, other than an interest in a non-resident trust that is a foreign affiliate for the purposes of section 233.4.

☐ Yes

☐ No

An interest in a partnership that holds a Specified Foreign Property unless the partnership is required to file a T1135.

☐ Yes

☐ No

An interest in, or right with respect to, an entity that is a non-resident.

☐ Yes

☐ No

A property that is convertible into, exchangeable for, or confers a right to acquire a property that is Specified Foreign Property.

☐ Yes

☐ No

A debt owed by a non-resident, including government and corporate bonds, debentures, mortgages, and notes receivable.

☐ Yes

☐ No

An interest in a foreign insurance policy.

☐ Yes

☐ No

Precious metals, gold certificates, and futures contracts held outside Canada.

☐ Yes

☐ No