

Please complete the following personal information and checklist below for us to help serve you better.

Please also include one government issued photo ID to comply with recent CRA regulations.

Your Name: _____ SIN: _____

Address: _____ Birthdate: _____

_____ Phone: _____

_____ Email: _____

Province/Territory of residence on Dec 31: _____

Marital Status (circle one): Married / Living common-law / Widowed / Divorced / Separated / Single

Spouse Name: _____ Spouse SIN: _____

Spouse Birthdate: _____

If we are preparing your return, but not your spouse's, please provide spouse's net income: _____

Spouses can share certain credits. If applicable, please advise who will claim donations and medical, as well as any other important information such as transferring of other credits. We will apply the most tax efficient apportioning if we do not receive your instructions.

Please list names, birthdates, SINs, and any other relevant info about dependents (including children):

Are you a Canadian Citizen? Yes No

Would you like to register for CRA email notifications with your email address? Yes No

If yes, we will send CRA your personal email noted above. Note: you must have or set up a CRA My Account to access the CRA correspondence sent to your personal email

Would you like CRA to give your name, address, date of birth, and citizenship to Elections Canada to update the National Register of Electors or Future Electors? Yes No

Would you like CRA to provide info to Ontario Health to be contacted by email about organ and tissue donation? Yes No

Did you dispose of a property (or properties) in 2024? Yes No

If yes, would you like to claim a principal residence exemption for one or more years?

Yes No

If property disposed, please provide full details of the disposal

Did you dispose of a housing unit (including a rental property or rights to purchase a property) in 2024? Yes No

Did you own specified foreign property at any time in 2024 with a total cost of more than CAN\$100,000? Yes No

If yes, please provide details of all specified foreign property held in 2024

Did you own an interest in a foreign affiliate at any time in 2024? Yes No

Did you opened a First Home Savings Account (FHSA) during 2024? Yes No

Have you been issued the Disability Tax Credit (DTC)? Yes No

Did you immigrate to / emigrate from Canada during the year? Yes No

If yes, please provide the date of entry/departure:

Please complete this checklist, send us a copy, and retain a copy for your records

RECEIPTS AND INFORMATION SLIPS

- Last year's notice of (re)assessment
- All tax slips (T3, T4, T4A, T4AP, T4RSP, T4E, T5, T5013, etc)
- Receipts for professional or union dues
- RRSP contributions and withdrawals
- Medical expense receipts
- Tuition receipts (T2202)
- Charitable and political donation receipts
- Capital gain/loss summary (including details of Cryptocurrency gains/losses)
- Home Buyers Plan (HBP), First Home Savings Account (FHSA), or Lifelong Learning Plan (LLP)
- Receipts for Canadian digital news subscriptions

RENTAL AND SELF-EMPLOYMENT INCOME

- Rental income and expenses
- Property taxes and/or rent paid
- Automobile expenses (gas, R&M, insurance, total km driven, km driven for business, etc)
- Travel expenses
- Office use of home expenses (interest, insurance, repairs maintenance, area of home, area of office, etc)
- Asset purchases (including auto)

PERSONAL AND FAMILY INFO

- Birth, adoption, or death in the family
- Separation or divorce
- Child or spousal support received or paid
- Child care expenses
- Disability credit
- Caregiver/Nanny expense
- Home accessibility improvements for disabled or senior
- Public transit expense receipts (Ontario Seniors only)

OTHER TAX INFORMATION

- Interest charges for investments
- Financial advisory/brokerage fees
- Social assistance payments
- Workers' compensation benefits
- Interest and dividends (not on T5 slips)
- Sale (or deemed sale) of stocks, bonds, or real estate (including principal residence)
- Installments paid
- Other income received
- Moving expenses
- T2200 - Declaration of conditions of employment
- Student loan interest paid