



Personal Income Tax Return Checklist 2025

PERSONAL INFORMATION

Name:	SIN:	Date of Birth:
Apt./Suite - Street Name, City, Postal Code:		
Tel:	Email:	
Marital Status: <input type="checkbox"/> Married <input type="checkbox"/> Single <input type="checkbox"/> Separated <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed <input type="checkbox"/> Common-law		
Is this your First Tax Return Filing? <input type="checkbox"/> Yes <input type="checkbox"/> No		Date of Entry into Canada
Do you need to file Last year Tax Return? <input type="checkbox"/> Yes <input type="checkbox"/> No		Date of Exit out of Canada
Citizenship: <input type="checkbox"/> Canadian (If so, do you allow the CRA to release information about you to Elections Canada? <input type="checkbox"/> Yes <input type="checkbox"/> No) <input type="checkbox"/> U.S. (If so, you may be required to file a U.S. tax return)		

SPOUSE'S INFORMATION

Full Name:	SIN:
Date of Birth:	Citizenship:
If we are not preparing your spouse's tax return: Net income from line 23600 of their tax return: _____	
If you marital status changed during the year, please provide the date it changed(DD/MM/YYYY): _____	

MINOR, INFIRM, OR ELDERLY DEPENDANTS INFORMATION

Name	SIN	Date of Birth	Net Income (from line 236)



INCOME	INCLUDED	INFORMATION REQUIRED
Employment Wages or Salary		T4, T4A Slips
Pension Income		T4A, T4A(P), T4A(OAS), T4RSP, T4RIF Slips
Employment Insurance Benefits & Repayments		T4E Slips
Investment Income		T3, T5, T600 Slips
Income from Trust or Mutual Funds		T3 Slips
Partnership Income		T5013 Slips or Details
Tax Shelter Income		T5003 Slips
Social Assistance or Workers compensation etc.		T5007 Slips
Other Employment income (Stock options and elections form)	<input type="checkbox"/>	T1212 Slips
Taxable Capital Gains and Losses	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	T5008 Slips
Statement of Contract Payments		T5018 Slips
Rental Income and Expenses		Completely Table No.3
Self Employment, Business, Professional Income and Expenses	<input type="checkbox"/>	Complete Table 4,5 and 6
Spousal Support	<input type="checkbox"/> <input type="checkbox"/>	Name & Address of Payer, Amount Received
Foreign Property worth over \$100,000		T1135 Slips
Sale/ Change of use of Principal Residence (Must now be reported)	<input type="checkbox"/>	Purchase date, sale date, and proceeds

DEDUCTIONS, CREDITS, AND OTHERS	INCLUDED	INFORMATION REQUIRED
Pension Plan, RRSP Contributions		T4, T4A Slips, Official Receipts
Union or Professional Dues		T4 Slips, Official Receipts
Moving Expenses	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Details of Expenses, Total Expenses, Old Address
Labour Mobility Tax Credit		Travel and Relocation Expenses
Interest Expenses / Investment Expenses		Details & Purpose of the Loan
Child Care Expenses	<input type="checkbox"/> <input type="checkbox"/>	Complete Table No. 1
Employment Expenses		Complete Table No. 2, 5, 6 and T2200 from Employer
Employment Expenses for Working at Home	<input type="checkbox"/>	T2200 Slip or T2200S Slip from Employer, Go here to calculate your claim
Charitable / Political Donations	<input type="checkbox"/> <input type="checkbox"/>	Official Receipts
Canada Caregiver Amount		Details
Home Accessibility Expenses for Seniors or Disabled Persons	<input type="checkbox"/>	Details and Renovation Receipts
Disability Tax Credit	<input type="checkbox"/>	T2201 Slips



DEDUCTIONS, CREDITS AND OTHERS	INCLUDED	INFORMATION REQUIRED
Medical / Dental Expenses	<input type="checkbox"/>	Official Receipts (or Summary from Pharmacy) Provide Total Dollar Amount
Education Expenses / Tuition Fees / Exam Fees	<input type="checkbox"/> <input type="checkbox"/>	T2202 (from Institution), TL11 (foreign), Receipts
Interest paid on Student Loans		Details
Home Buyer's / Volunteer Firefighter / Search & Rescue Amount	<input type="checkbox"/>	Details
Digital News Subscription Tax Credit (2024 only)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Official Receipt with QCJO Designation Number
Eligible Educator School Supply Tax Credit		Eligible Receipts, Certification from Employer
Canada Training Tax Credit		Training Fees Receipts
Home Accessibility Tax Credit		Receipt for Home Renovations

CHILD CARE EXPENSES (TABLE NO. 1) (Original or Copy of Receipts Must be Provided)		
Caregiver Name:	SIN (If Applicable):	Total Paid:
Address:		

EMPLOYMENT EXPENSES (TABLE NO. 2) (Completed T2200 from Employer. Original receipts not required. Please keep receipts for 7 years)			
Accounting / Legal Fees	\$	Parking	\$
Advertising / Promotion	\$	Supplies / Postage/ Stationery	\$
Automobile	Complete Table No. 5	Tools	\$
Lodging	\$	Other ()	\$
Meals / Entertainment	\$		

NOTE: This is only for tradespeople who are required by their employer to purchase tools. You must have spent over \$1000.



RENTAL INCOME (TABLE NO. 3) (Original Receipts not required. Please keep receipts for 7 years)			
Address of the Property:		Co-Owners Name:	
		SIN:	%Ownership:
Personal Use %:		GST/HST Registrant: <input type="checkbox"/> Yes <input type="checkbox"/> No (if Yes, Quick Method? <input type="checkbox"/> Yes <input type="checkbox"/> No)	
Expenses (Provide 100% of expenses)			
Advertising	\$	Maintenance/Repairs /	\$
Insurance	\$	Property Taxes/Others	
Interest	\$	Renovation	\$
Utilities	\$	Gross Rental Income	\$
Gross Rental Income (Provide 100% of income): \$			

PRIOR-YEAR / SPECIAL SITUATIONS (ONLY IF APPLICABLE)	INCLUDED	INFORMATION REQUIRED
CERB / CRB Income		T4ACERB, T4A CRB Slips
CERB / CRB Repayments		Support for any CERB / CRB amounts repaid
First Home Savings Account (FHSA)		T4FHSA slips, contribution details, withdrawal details, indicate if account opened during the year
Cryptocurrency / Digital Assets		Transaction summary (buy/sell/trade/stake), exchange statements, wallet records
Short-Term Rental / Airbnb Income		Rental income details, expense breakdown, confirmation of municipal/provincial compliance
Trust / Property Ownership (including Bare Trusts)		Details of property held for others, trust agreements, ownership structure

HOME OFFICE EXPENSES (TABLE NO. 6) (Original Receipts not required. Please keep receipts for 7 years)				
Gas	\$	Rent	\$	Square Footage Needed: Business Use ft ² Total House ft ²
Electricity	\$	Insurance	\$	
Water/Sewer	\$	Property Taxes	\$	
Maintenance	\$	Other ()	\$	
Mortgage Interest	\$	Other ()	\$	

Note: Insurance and Property Taxes are eligible deductions for commissioned employees and self-employed only. Mortgage Interest is for self-employed only.



CHARTERED PROFESSIONAL
ACCOUNTANT

Syed A. Raza Professional Corporation

SELF-EMPLOYMENT/BUSINESS/PROFESSIONAL INCOME (TABLE NO. 4)

(Original Receipts not required. Please keep receipts for 7 years)

GST/HST Registrant? <input type="checkbox"/> Yes <input type="checkbox"/> No	Do you file your own GST/HST? <input type="checkbox"/> Yes <input type="checkbox"/> No
If Yes, Quick Method? <input type="checkbox"/> Yes <input type="checkbox"/> No	Registered to pay EI premiums? <input type="checkbox"/> Yes <input type="checkbox"/> No
Are all of the figures you indicated GST/HST inclusive? <input type="checkbox"/> Yes <input type="checkbox"/> No	

Expenses:

Accounting/Legal/Consulting	\$	Travel	\$
Advertising	\$	Equipment Rentals	\$
Automobile	Complete Table 5	Insurance	\$
Business Tax/Fees/License/Dues	\$	Interest/Bank Charges	\$
Maintenance/Repairs	\$	Utilities	\$
Management/Administration	\$	Office/Supplies	\$
Meals/Entertainment (100%)	\$	Property Tax(Business Premises)	\$
Private Healthcare Premiums	\$	Other()	\$
Salaries and Benefits	\$	Other()	\$

Sales / Gross Revenue: \$

Note: Complete Table No. 6 for Business Use of Home

AUTO EXPENSES (TABLE NO. 5) (Original Receipts not required. Please keep receipts for 7 years)

Bought or sold a new vehicle last year? <input type="checkbox"/> Yes <input type="checkbox"/> No	Started to use your vehicle for business during the year? <input type="checkbox"/> Yes <input type="checkbox"/> No
No Started or stopped leasing a vehicle? <input type="checkbox"/> Yes <input type="checkbox"/> No	If Yes, please specify the estimated value at that point:
If yes, please provide purchase/loan/sale/leasing documents	\$

Fuel	\$	Kilometers Needed: Business Use: _____ km Total Use: _____ km
Insurance	\$	
Interest	\$	
Leasing Cost	\$	
Maintenance/Repairs	\$	
Other ()	\$	