

# ESG Chartered Professional Accountants

## 2025 Personal Tax Return Checklist

Please use this checklist as a guide in preparing your documentation for the preparation of your personal tax return. It is important to prepare and file a complete tax return to avoid penalties later in the year.

### Personal Information

Name		SIN	Date of Birth
Taxpayer			
Spouse			
Address			
Email Taxpayer			
Email Spouse			
Taxpayer Mobile Phone Number			
Spouse Mobile Phone Number			
Home Phone			
Tax Return	<input type="checkbox"/> Email <input type="checkbox"/> Print		

Marital Status:  Married     Single     Common-law  Separated     Divorced     Widowed

If your marital status changed during the year, provide date of change: \_\_\_\_\_

If eligible, do you wish to split pension income with your spouse?     Yes     No

### Dependents

Name	Relationship	Date of birth	SIN	Disability?	Income

Did you receive or make support payments during the year?     Yes     No

### Residence

What was your Province or Territory of residence on December 31<sup>st</sup>, 2025? \_\_\_\_\_

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

If yes, provide date of entry into Canada \_\_\_\_\_ or date of departure \_\_\_\_\_

# Elections Canada

Are you a Canadian citizen?

Yes  No

If yes, do you authorize the CRA to provide your name, address and date of birth to Elections Canada to update your information on the National Register of Electors?

Yes  No

## Foreign Reporting

Did you own or hold foreign property with a total cost of \$100,000 Canadian or more at any time during the year? If so, please provide details and **also include your full investment package for the tax year**.

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):

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**Note: \*\*Penalty for late filing of the sale of your Principal Residence is \$100 per month to max of \$8,000- plus potential denial of tax exemption & due same time as the return of the T1\*\***

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Year purchased:	Sold price:	Purchased Price:
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## 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:

1. Dividends or shareholder benefits from a private corporation  Yes  No
2. Partnership or Trust income from a related business  Yes  No
3. Rental income (including through a trust or partnership) where a related person is involved  Yes  No
4. Interest on loans to a private corporation, partnership or trust  Yes  No
5. Income or gains from the disposition of private shares or other property  Yes  No

## Income

T4 Slips – Employment income	<input type="checkbox"/> Yes <input type="checkbox"/> No
T4A Slips – Commission, self-employment, pension and scholarships	<input type="checkbox"/> Yes <input type="checkbox"/> No
T4AP Slips – Canada Pension Plan benefits	<input type="checkbox"/> Yes <input type="checkbox"/> No
T4A(OAS) Slip – Old Age Security	<input type="checkbox"/> Yes <input type="checkbox"/> No
T4E Slips – Employment insurance	<input type="checkbox"/> Yes <input type="checkbox"/> No
T4PS Slips – Profit Sharing Plans	<input type="checkbox"/> Yes <input type="checkbox"/> No
T4RSP Slips – RRSP income/withdrawals	<input type="checkbox"/> Yes <input type="checkbox"/> No
T4RIF Slips – RRIF income/withdrawals	<input type="checkbox"/> Yes <input type="checkbox"/> No
T5 Slips – Investment income	<input type="checkbox"/> Yes <input type="checkbox"/> No
T3 Slips – Income from trust allocations	<input type="checkbox"/> Yes <input type="checkbox"/> No
T5013 Slips – Partnership income	<input type="checkbox"/> Yes <input type="checkbox"/> No
T5008 Slips – Income from security transactions	<input type="checkbox"/> Yes <input type="checkbox"/> No
T5007 Slips – Social assistance and workers compensation	<input type="checkbox"/> Yes <input type="checkbox"/> No
Details on the sale of unregistered stocks, bonds, mutual funds, etc	<input type="checkbox"/> Yes <input type="checkbox"/> No
Foreign income	<input type="checkbox"/> Yes <input type="checkbox"/> No
Details of rental income and expenses	<input type="checkbox"/> Yes <input type="checkbox"/> No
Details of self-employed income and expenses	<input type="checkbox"/> Yes <input type="checkbox"/> No
Details on spousal support income or expense	<input type="checkbox"/> Yes <input type="checkbox"/> No
Any other income to report not reported on a slip	<input type="checkbox"/> Yes <input type="checkbox"/> No

## Deductions and Tax Credits

RRSP contributions	<input type="checkbox"/> Yes <input type="checkbox"/> No
Childcare expenses	<input type="checkbox"/> Yes <input type="checkbox"/> No
Union, professional or association dues (for which not reimbursed)	<input type="checkbox"/> Yes <input type="checkbox"/> No
Moving expenses	<input type="checkbox"/> Yes <input type="checkbox"/> No
Carrying charges (interest fees)	<input type="checkbox"/> Yes <input type="checkbox"/> No
Employment expenses (T2200 from employer required)	<input type="checkbox"/> Yes <input type="checkbox"/> No
Did you contribute to a first home savings account	<input type="checkbox"/> Yes <input type="checkbox"/> No
Northern resident deduction and travel expenses	<input type="checkbox"/> Yes <input type="checkbox"/> No
Caregiver credit	<input type="checkbox"/> Yes <input type="checkbox"/> No
Disability credit	<input type="checkbox"/> Yes <input type="checkbox"/> No
Interest paid on student loans	<input type="checkbox"/> Yes <input type="checkbox"/> No
T2202A Slips – Tuition paid	<input type="checkbox"/> Yes <input type="checkbox"/> No
Medical expenses for <b>(RX's please get statement from pharmacy)</b>	
<b>(Note: Massages &amp; Acupuncture are not covered by Manitoba CRA Benefits)</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
Charitable donations	<input type="checkbox"/> Yes <input type="checkbox"/> No
Political contributions	<input type="checkbox"/> Yes <input type="checkbox"/> No
Provincial credits – property tax and/or rent	<input type="checkbox"/> Yes <input type="checkbox"/> No
First time home buyers tax credit	<input type="checkbox"/> Yes <input type="checkbox"/> No
Tax paid by installments	<input type="checkbox"/> Yes <input type="checkbox"/> No
Did you include your property tax statement?	<input type="checkbox"/> Yes <input type="checkbox"/> No
First Homes Savings Account (FHSA)	<input type="checkbox"/> Yes <input type="checkbox"/> No