

Preparing to File your 2025 Personal Tax Returns

Although not exhaustive, the following list of potential documents meets the majority of Canadians' needs and may be required to claim the maximum credits and optimize your tax refund:

Documents from Canada Revenue Agency (CRA) may include:

Notice of Assessment for 2024
Reassessments for any tax year received in 2025
Review Letters or other correspondence from CRA received in 2025

Documents regarding income may include:

T3 for trust income
T4 for employment income
T4A for other income (including OAS and CPP)
T4E for employment insurance benefits
T4FHSA for distributions or activity within a First Home Savings Account
T4P for pension income
T4RSP for RRSP withdrawals
T4RIF for RRIF income
T5 for investment income
T5007 for government benefits
T5008 for sale of securities/shares
T5013 for partnership income
Spousal and/or child support received
Business income and expenses
Details of the sale of any crypto-currencies
Rental property revenue and expenses (including short-term rentals such as AirBnB)
Online revenue (including Instagram, Amazon sales, YouTube, Etsy, etc.)
Self-employment income and expenses (including Instacart, Uber, Doordash, etc.)
Details of foreign income or pensions received

Documents regarding tax credits/eligible deductions may include:

RRSP contribution receipts made between March 2025 and March 2, 2026
FHSA Contributions to your First Home Savings Account
Union or professional dues
Charitable donations and Political contributions
Long-term care expenses (detailed receipt from facility)
Child care and Spousal and/or child support paid
T2202 Tuition Fees and Student loan interest
Moving expenses (must be at least 40 km closer to place of employment)
T2200 signed by employer to claim certain employment expenses (and related receipts)
Investment expenses (interest and management fees for NON-registered accounts only)
TL2 Claim for Meals and Lodging Expenses (for transport employees including truck drivers)
Medical expenses including prescriptions, dental, vision, and extended health and/or travel medical insurance plan premiums (also certain travel expenses can be claimed for medical travel over 40 km one-way)
Details on the purchase of new home (may qualify for home buyer's credit)
Details on the sale of any real property including primary residence
Multigenerational Home Renovation Tax Credit: receipts for building a secondary suite for a senior or a person with a disability

Your Chartered Professional Accountant will review your personal situation, check available documentation, compare with previous years' returns, and may request further information in addition to the above.