

DATE RECEIVED _____

PICK UP DATE _____

T1 Personal Tax Return Year



Please complete this checklist and return it to us together with your financial/tax information

Number of tax returns to be prepared: _____

Personal Information		Spouse Information (If Applicable)	
Name:		Name:	
SIN Number:		SIN Number:	
Date of Birth:	(YYYY/MM/DD)	Date of Birth:	(YYYY/MM/DD)
Phone #:		Phone #:	
E-mail:		E-mail:	
Address:		Address:	
City		City	
Province/State:	Postal Code:	Province/State:	Postal Code:
Did you during the year:		Did you during the year:	
Emigrate from Canada?	Immigrate to Canada?	Emigrate from Canada?	Immigrate to Canada?
<i>Emigration date:</i>	<i>Immigration date:</i>	<i>Emigration date:</i>	<i>Immigration date:</i>

Marital Status: (Please circle)	Single	Married	Common-Law	Separated	Divorced	Widowed
Did your marital status change from last year's tax return?	O Yes/No		<i>Date status changed:</i>			
Are we preparing a tax return for your spouse?	O Yes	O No	O N/A			
If we are NOT preparing a tax return for your spouse, please provide: <i>Income figure from Line 23600 on page 4</i> \$ _____						

Please list all dependants below:

Name	Relationship	Birthday (YYYY/MM/DD)	SIN#	Net Income During Year
1 _____				
2 _____				
3 _____				
4 _____				

Other Matters

- Do you, your spouse or any of your dependants qualify for the Disability Tax Credit? Whom? Yes No
- Are you a Canadian citizen? Yes No
- Do you authorize the CRA to provide information about you to Elections Canada? Yes No
- Do you own/hold foreign property (including shares) with a total cost of more than \$100,000 (CAD)? Yes No
- Have you made installment payments for the tax year? *If yes, how much \$* _____ Yes No
- Did you sell your principal residence? *If yes, what year?* _____ Yes No
- Are we preparing a tax return for a deceased person?
If yes, date of death _____; **Copy of death certificate and will required**
- Are you claiming work from home expenses? Signed T2200 req'd Yes No
- Did you pay property tax? Property tax paid \$ _____ Yes No
- Did you rent? Rent pd:\$ _____ Name of landlord: _____ Yes No
- Do you have a rental property, sold your 2nd property or have self employed income? Details req'd Yes No
- Are you a first-time home buyer? Yes No
If yes, need address of property and acquisition date. Max \$10,000 x 15% - \$1,500
- Have you opened a FHSA and made contributions in 2024? If yes, contribution receipt required Yes No
- Did you make any charitable contributions in the first two mths of 2025? If yes, these are claimable Yes No
- Did you pay childcare expenses, interest on student loans or digital news subscription? Details req'd Yes No
- Did you incurred eligible expenses that qualifies for the Home Assessibility Tax credit? Yes No

Please bring your 2023 Notice of assessment if you have it

Please complete at back any additional notes or information that are relevant to completing your tax return or more info on the abo