

Please complete this form and return it with your tax slips and receipts. Fields marked * are required.

Tax year this form relates to *

(e.g. 2025)

Province / territory of residence on 31 Dec

1. PERSONAL INFORMATION

Full legal name *

Date of birth (YYYY-MM-DD) *

Marital status on 31 December of the tax year *

- ☐ Single ☐ Married ☐ Common-law
☐ Widowed ☐ Separated ☐ Divorced

Date marital status changed, if it changed during the tax year (YYYY-MM-DD)

2. SPOUSE OR COMMON-LAW PARTNER

Complete this section if you were married or living common-law on 31 December of the tax year.

Full legal name of spouse / common-law partner

Date of birth of spouse (YYYY-MM-DD)

3. DEPENDANTS

Do you have dependants (children, adult children with a disability, or a parent with a disability)?

☐ YES ☐ NO

If yes, list each dependant: full name, date of birth, relationship to you, and any child-care expenses (daycare, etc.).

4. CONTACT INFORMATION

Email address(es) for all parties *

Phone number(s) for all parties *

Current mailing address *

5. ELECTIONS CANADA

Do you agree to share your information with Elections Canada? *

☐ YES ☐ NO

CRA may share your name, address, date of birth and citizenship with Elections Canada so your voter information can be updated.

6. DISABILITY TAX CREDIT

Have you been approved for the Disability Tax Credit? *

☐ YES ☐ NO

If approved, expiry date (YYYY-MM-DD)

Check your CRA My Account or the approval certificate.

7. FOREIGN PROPERTY & FOREIGN AFFILIATES

Do you own more than \$100,000 in foreign property? *

☐ YES ☐ NO

Specified foreign property includes foreign bank accounts, shares, rental property and other assets outside Canada (T1135).

Do you own or hold an interest in a non-resident corporation or trust that is a foreign affiliate or controlled-foreign affiliate at any time during this past tax season? *

☐ YES ☐ NO

8. FIRST HOME SAVINGS ACCOUNT (FHSA)

Did you start a First Home Savings Account in the past tax year? *

☐ YES ☐ NO

9. PENSION SPLITTING

If you have a pension and are married / common-law, do you want to do pension splitting?

☐ YES ☐ NO

10. VOLUNTEER FIREFIGHTER / SEARCH AND RESCUE VOLUNTEER

If so, you have to provide proof. Reach out to your volunteer supervisor to get the appropriate paperwork.

☐ Volunteer firefighter ☐ Search and rescue volunteer ☐ Neither

11. ORGAN AND TISSUE DONATION (SELECTED PROVINCES)

Do you authorize CRA to provide your email address to the provincial government and the Ministry of Hospital and Surgical Health Services to contact you about organ and tissue donation?

This question applies to the following provinces only: Alberta, British Columbia, Nunavut, and Ontario.

☐ YES ☐ NO

12. SALE OF A HOME (PRINCIPAL RESIDENCE / CAPITAL PROPERTY)

Required to determine whether the principal-residence exemption applies and whether a T2091 / Schedule 3 is needed.

Did you sell a home in ? ☐ YES ☐ NO

If yes, complete the following for each home sold. Use the notes box if you sold more than one property.

Date you purchased this home (YYYY-MM-DD)

Amount paid when purchased

\$

Date of the sale (YYYY-MM-DD)

Amount the home sold for

\$

Was this home your primary residence?

☐ YES ☐ NO

Address of the home sold (street, city, province, postal code)

Notes (second property sold, outlays and expenses, years designated as principal residence, etc.)

13. ADDITIONAL INFORMATION REQUIRED TO COMPLETE THE TAX RETURN

Attach receipts / supporting documents. Briefly describe amounts below so nothing is missed.

Medical expenses (receipts required)

Medical travel expenses (letter proving you attended a medical appointment 40 km or more one way)

Donations made to REGISTERED CHARITIES (receipt must show the registered charity number)

Tuition for secondary / post-secondary education (T2202 or official tax receipt)

Anything else we should know? (RRSP / FHSA / TFSA contributions, moving, support payments, rental, business, etc.)

14. PROVINCIAL AND TERRITORIAL CREDITS (RECEIPTS / PROOF REQUIRED TO CLAIM)

BC — HST/sales tax credit; home renovation tax credit (seniors / disability); 10% R&D tax credit.
AB — Investor tax credit; stock savings plan tax credit (T89); R&D / interactive economic growth credit up to 20%.
SK — First-time home buyers' amount; home renovation expenses.
MB — Homeowners affordability tax credit; seniors school tax rebate; 15% R&D tax credit.
ON — Energy and property tax credit; Northern Ontario energy credit; senior homeowners' property tax grant.
QC — 16.5% Quebec abatement; Solidarity tax credit. Quebec files a separate provincial return.
NB — Seniors' home renovation tax credit; fully refundable 15% R&D credit.
PE — Volunteer firefighter / search and rescue credit.
NS & NL — Fully refundable 15% R&D credits; low-income tax reductions. NL also has a fitness tax credit.

Credits you believe may apply, or receipts you are attaching

15. AUTHORIZATION AND SIGNATURE

I confirm that the information on this form is true, complete and accurate to the best of my knowledge. I authorize Hooks Books Inc. to use this information to prepare my (our) income tax return(s) and to contact me if further documents are required. I understand that I remain responsible for the return filed.

☐ I have read and agree to the statement above.

Signature of taxpayer

Print name

Date (YYYY-MM-DD)

Spouse / partner signature (if a joint / combined return is being prepared)

Print name

Date (YYYY-MM-DD)

How to return this form: email info@hooksbooks.ca, send via the secure message link on www.hooksbooks.ca, or call (709) 727-7293 for pickup.

Mobile service is available in the Conception Bay South / St. John's area. Hours: Monday–Friday 9:00 a.m. – 5:00 p.m.