

# The Graphite Group, Chartered Professional Accountants

## Personal Income Tax Return Checklist - 2025

Name: \_\_\_\_\_

Email: \_\_\_\_\_ Preferred Phone Number: \_\_\_\_\_

**Would you prefer your tax return as an electronic PDF rather than a paper copy?**  
**(Client portal required for PDF)** Yes No

**At any time in 2025 did you sell your principal residence or change its use?** Yes No

**At any time in 2025 did you have any *Specified Foreign Property* (e.g. funds held outside Canada, shares of non-resident corporations, loans to non-residents, interest in non-resident Trusts, real property outside of Canada [other than personal use real estate] or other foreign property)?**  
**If "Yes" we will contact you for additional details required by the CRA.** Yes No

**Do you authorize CRA to provide your name, address & birth date to Elections Canada?** Yes No

**Do you authorize CRA to provide your name to BC Transplant so that BC Transplant may contact you with information about organ and tissue donation?** Yes No

**Do you have any new dependants? If yes, please provide information.** Yes No

**Was there a change to your marital status during the year? Date of change: \_\_\_\_\_.** Yes No

### Common sources of income (provide slips, documents or details)

- |  |   |  |
|--|---|--|
| <input type="checkbox"/> Employment income (T4)        | <input type="checkbox"/> Old Age Security (T4A OAS)       | <input type="checkbox"/> Tips and gratuities not on a T4 |
| <input type="checkbox"/> Investment income             | <input type="checkbox"/> Canada Pension Benefits (T4A(P)) | <input type="checkbox"/> Spousal/child support received  |
| <input type="checkbox"/> - Dividends (T5)              | <input type="checkbox"/> Pensions & other income (T4A)    | <input type="checkbox"/> RIF Income (T4RIF)              |
| <input type="checkbox"/> - Interest (T5/T3)            | <input type="checkbox"/> RRSP income (T4RRSP)             | <input type="checkbox"/> Business income/expenses*       |
| <input type="checkbox"/> - Trust income (T3)           | <input type="checkbox"/> Capital gains/losses (T5018)     | <input type="checkbox"/> Rental income/expenses*         |
| <input type="checkbox"/> - Partnership returns (T5013) | (please provide gain/loss reports with dates)             | <input type="checkbox"/> Employment insurance (T4E)      |

### Common deductions & credits (provide receipts, documents or details)

- |  |   |  |
|--|---|--|
| <input type="checkbox"/> RRSP contributions                  | <input type="checkbox"/> Investment counsel fees                | <input type="checkbox"/> First-time home buyer tax credit                                |
| <input type="checkbox"/> Home Buyers Plan (HBP) repayment    | (not RRSP or TFSA)  | <input type="checkbox"/> Spousal/child support paid                                      |
| <input type="checkbox"/> Child care/adoption expenses        | <input type="checkbox"/> First Home Savings Account (FHSA)      | <input type="checkbox"/> Student loan interest paid                                      |
| <input type="checkbox"/> Professional/Union dues             | <input type="checkbox"/> Deductible employment expenses         | <input type="checkbox"/> Moving expenses   |
| <input type="checkbox"/> Tuition fees (T2202)                | (form T2200 required)   | <input type="checkbox"/> Seniors - multigenerational renos/<br>home accessibility costs* |
| <input type="checkbox"/> Digital news subscription expenses  | <input type="checkbox"/> BC renter's credit - max. income \$80K | <input type="checkbox"/> Charitable/Political Donations                                  |
| <input type="checkbox"/> Teachers - School Supply Tax Credit | (address, total rent, months, landlord)                         |  |
| <input type="checkbox"/> Medical/dental/attendant expenses   |   |  |

- Please do not include the credit or debit card receipt. Please do not staple the receipts. Thank you.
- Please request a summary statement from your pharmacy for all prescriptions for the year.
- Please advise of any reimbursements received or premiums paid from/to insurance, with annual statement.

What is your favourite streaming service? \_\_\_\_\_

### COMMENTS/ADDITIONAL INFORMATION OR CHANGES FROM LAST YEAR

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