

# 2025 Tax Checklist

Our Checklist is meticulously crafted to guide you through gathering all the required reporting information and documents for your 2025 tax return preparation. Should you need any assistance, feel free to reach out to our dedicated team at M.A. Consulting Corp

- New Immigrant or First-Time Filer**  
Complete "Taxpayer Identification Details"

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- Details on any changes to your family info** (Marital status, new dependents, change of address, etc.)

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- Prior Years tax returns or NOA** (if you are filling with us for the first-time)

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- T4** (Employment Income)

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- T4A** (Pension, annuity and similar income, OAS, CPP)

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- T4RIF** (Registered Retirement Income Fund receipts)

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- T4RSP** (Registered Retirement Savings Plan receipts)

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- T4E** (Employment Income benefits)

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- T4PS** (Statement of Employees Profit Sharing Plan Allocations and Payments)

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- T5** (Interest or taxable dividends)

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- T5008** (Dispositions of securities)

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- T101 and T102** (Resource expenses flow-through shares)

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- T3** (Statement of income from mutual funds, trusts, and income trust units)

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- T2200** (Declaration of conditions of employment signed by the employer)

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- T5013** (Statement of partnership income/loss)

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- Investments** (Non-registered accounts)

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- Provide a list of all investments** (e.g., stock, mutual funds) purchased and sold along with applicable details (e.g. sale price, cost, and outlays) and management fees paid. If applicable, please request this information along with a capital gain/loss trading summary from your broker/banker

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- Alimony or maintenance payment details**

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- Personal tax credit claims for dependents** (e.g., caregiver, disability, eligible dependent, etc.)
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- RRSP contribution receipts** (RRSP Home Buyers Plan details, Lifelong Learning Plan withdrawal receipts, etc.)
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- FHSA contribution receipts**
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- Charitable donation receipts**
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- Union or professional dues**
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- Interest expenses** (Amount paid and details of loans for business or investment purposes)
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- T2202A** (Student tuition receipts, details of paid student loan interest)
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- Medical receipts and Home Accessibility Tax Credit receipts** (Annual printout from pharmacy or insurance company)
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- Political contribution receipts**
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- Tax installment receipts/statement from Canada Revenue Agency**
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- Prior years Notice of (re) Assessment from Canada Revenue Agency**
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- Childcare expense receipts** (Details)
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- Employment expense information** (Meals, home office, etc.)
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- Self-employment information** (Including revenue, expenses and related GST information)  
Complete "Statement of Business & Professional Income Schedule"
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- Summary of rental properties** (Receipts and expenses for each property)  
Complete "Rental Property Schedule"
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- Details of personally-held foreign investments**  
If applicable, please request foreign investment summaries from your broker/banker
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- Moving expenses and details**  
Complete "Moving Expense Deduction Schedule"
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- Real estate acquisition and disposition details throughout the year** (Including your principal residence)
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- Receipts to digital news subscriptions to qualified Canadian journalism organizations up to \$500**
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- Direct Deposit Form or Void Cheque** (If your bank information change or filing first time)
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- Rent or property tax amount, address, and payment made to** (If you live in Ontario or BC)
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