

# 2025 Tax Year With Tatlock Books and Tax



## Personal Tax Package!

**If you are a sole proprietor, you also need the Business Tax Add-On**

Your professional personal and small biz (sole proprietor, farm, and rental) virtual tax solution is ready to help you file the 2025 tax year. We are a one-woman business, owned by Mary Gwen Thirlwall, who is dedicated to getting your taxes done right, and on time.

### How to work with us -

1. We provide you with a personal link to securely upload for your documents. Use last years link or ask for one at [tatlockbooks@gmail.com](mailto:tatlockbooks@gmail.com)

*Our online link can be used on your phone or computer. PDFs, Excel spreadsheets, Word documents, and JPEGs are acceptable. If you don't have a scanner, most phones will scan documents or you can take a picture and upload that. Our secure server is Canadian based and complies with Canadian privacy laws.*

2. You email us at [tatlockbooks@gmail.com](mailto:tatlockbooks@gmail.com) when everything is in the link so we know you are ready!
3. We get partial access to your myCRA account to make sure no slips and credits are missing – see box below!
4. We complete your taxes; we will email you if anything appears to be missing or we have questions
5. We send you a form to e-sign to allow us to e-file on your behalf, and your invoice.
6. Once signed and paid, we file your taxes, and give you a full copy in the secure link
7. We aim for a turnaround time of under 2 weeks once we receive all your documents (the earlier you submit, the faster we are!)

**To do your taxes properly, I require partial access to your myCRA account to ensure no slips or credits are missing. The CRA has changed how I can access this.**

**Past clients: I should have this already**

**New clients: Please go into your my CRA account and add me with level 2 access, my REP ID is WZ52W2F and I should come up as Mary Thirlwall**

**If you do NOT have access to your myCRA account please upload your most recent Notice of Assessment, and I will also send you a form to sign.**

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Personal tax information required			
Legal Name (per CRA)		Preferred Name/ Used name	
Birthdate		SIN	
Mailing Address			
Marital Status (circle)	Single married common law separated divorced widowed c/l means living together for at least 12 months OR have a child together separated means separated for at least 90 days and living apart		
Did your marital status change in 2025, if so, what was your previous status, and on which month			
E-mail address		Phone number	
Citizenship if other than Canadian Citizen			
Spouse, if applicable			
Legal Name		Preferred Name/ Used name	
Birthdate		SIN	
Email address (for e-signatures)			
Dependants, if any. Returning clients – please include any children born in 2025!			
Name	Date of Birth		

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Info we need checklist!	
<b>Copy of Government Issued photo ID – required for adults filing (not children)</b>	
A copy of your 2024 Notice of Assessment (imperative if I don't have myCRA access!)	
Any and all income slips from employment, benefits, pension, and interest. T4, T4A, T4E etc. <b>Anything that starts with a T!</b>	
Any other income including foreign income, foreign pensions, WSIB, and disability income	
Capital gains to declare not found on Tslips. This includes the sale of a second home, land, or rental unit, sale of standing timber, and sale of valuables.	
Crypto gains or losses. Please provide details through KOINLY!	
Any self employment income? Small business, rental, MLM, side business, influencer income, farm? <b>If so, please complete the Business Add On as well</b>	
RRSP contribution receipts	
Union or professional dues receipts (ie annual licensing fees for your profession)	
Tuition receipts – <b>Please make sure I know of any tuition transfer between a student and parent</b>	
Receipts for interest paid on student loans	
Medical receipts. A summary of info for each person, for each type of payment is sufficient (ie prescriptions, eye care, dental) <b>Ask your pharmacy for a printout!</b>	
Charitable or political donations receipts. (MUST be a registered Canadian charity, Go Fund Me Donations are NOT deductible). <b>Unclaimed receipts from past 5 years can be claimed.</b>	
Childcare receipts, including overnight and day camps.	
Total amount of rent or property taxes paid (This is for the Trillium Benefit, generally received by households making 60 000 or less)	
Moving expenses if you moved 40km or more closer to a job, or for a new job(ask for details)	
Does anyone in the family receive the disability tax credit? If so, whom	
Is anyone in your home caring for another family member due to disability or impairment? If so, who is caring for whom?	

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Did you renovate to make your home more accessible for a senior (over 65) or someone with the Disability Tax Credit? Or to make your home a multigenerational home? If so, please provide receipts.	
Are you a volunteer firefighter or search and rescue personnel?	
Are you a teacher or ECE with expenses not covered by your employer? Please submit totals or receipts for supplies.	
Are you a tradesperson or apprentice? If yes, please include receipts or totals for tools. Did you have to relocate for work overnight? You can claim travel, meals, and accommodation for temporary relocation to a worksite 150km or more from your home.	
Have you made any tax prepayments? If so, how much?	
Do you own foreign property? What is the type, location, and value?	
Did you sell the home you primarily live in this tax year? <b>If so, I need the purchase year and price, and the selling price, and selling costs.</b> You DO NOT get taxed, but it must be declared!	
Did you purchase a home this year?	
Are you repaying a Home Buyers Plan?	
Did you invest in a first home savings account?	
Did you work from home this year? Please provide your T2200 and see the forms below	
Do you have adoption expenses?	
Do you have legal expenses to gain income such as pension, child support, or spousal support?	
Do you have receipts for a Canadian digital news subscription? Please include the receipt.	
Did you pay or receive child support? If so how much? PAID RECEIVED	
Did you pay or receive spousal support? If so how much? PAID RECEIVED  And what is the name and SIN of the other person	
<b>If you require taxes to be completed for someone who has died. Please provide the death certificate, proof you are their trustee, and details of how their assets are flowing (to spouse, or to a trust). I only do T1 personal taxes including final taxes, I do not do trust taxes.</b>	

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You, the client, are responsible to provide all information necessary to Tatlock Books and Tax for the purposes of completing your Income Taxes. This includes all world-wide gross income, and dispositions of capital property including the sale of personal residence. It also includes ensuring all deductions and expenses claimed with regards to a business, rental, farm, or employment are bona fide. You the client are responsible for keeping copies of all slips and returns should the CRA request them. You are aware that all returns may be subjected to a pre or post assessment review and/or audit and that Tatlock Bookkeeping is not liable for any results or amounts payable. You are aware that all fees payable to Tatlock Bookkeeping are due before the return is filed.

## Privacy Policy and Disclosure Authorization

Tatlock Bookkeeping respects the highly personal nature of the tax and bookkeeping information provided to us. The information will be used solely for the preparation of your books, tax return(s) and other tax related information, CRA follow-up/reviews/ audits, or other purposes as directed by you. We will have ready for pickup all original slips, receipts and documents upon completion of your returns and payment for service rendered. We may keep electronic copies of certain documents to support your return in the event of a review or audit. All documentation will be stored securely and not share with other parties except as noted. We will only disclose your personal information as legally required or as directed by you to the Canada Revenue Agency, Service Canada, other government agencies. We will share information with your accountant, your business partner, and your spouse or common law partner as may be necessary for the proper completion of your work and as directed by you. We will contact you related to the services we provide to you.

I have read and understood the above and will provide all necessary documentation for myself and my family. I am aware of the tax deadlines and opening information as indicated below.

Please have each adult sign and return

Signed \_\_\_\_\_

Date \_\_\_\_\_

Printed Name \_\_\_\_\_

Signed \_\_\_\_\_

Date \_\_\_\_\_

Printed Name \_\_\_\_\_

**Taxes can be e-filed as of late February 2026. The personal tax deadline is April 30 2023 for filing and paying any outstanding taxes. Self employed individuals and their spouses must file by June 15 2025 (but still pay by April 30 to avoid penalties).**

**For your taxes to be filed on time I require all paperwork by April 21 2026, May 15 2026 for self employed individuals.**

**I will be closed from June 18 to September 15 2026. Any late taxes, or CRA requests for information, will be dealt with after the summer. I will be working part time March 16-20 due to March Break.**

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## Special Circumstances

### T2200 – work from home

If you worked from home and wish to claim expenses, I need a copy of the T2200 from your employer as well as the info below. You may only claim expenses declared on the T2200 – there may be some expenses not listed below you can claim, please forward me the info.

Square footage of home		
Square footage of area used for Business		
Times and days worked		
Utility Costs – heat, hydro, water, internet		
Rent Costs		
Reimbursable expenses costs (as detailed on T2200)		

## Separation and Divorce

Taxes change when families change. If you provide your separation agreement it helps guide me on what we can, and cannot claim on your behalf.

1. You can claim legal fees to get spousal or child support (your lawyer can give you a receipt detailing that)
2. If you will be splitting the Child Tax Benefit a form, separate from your taxes, needs to be completed to initiate the change (ask me, we can do this!)
3. The eligible dependant benefit can only be claimed by parents who receives child support, either in full or in an equalized 50/50 custody situation
4. You can claim medical fees that you paid for your children
5. You can claim daycare/daycamp fees that you paid for your children while in your care or in a shared custody arrangement
6. Child support is not deductible or claimable
7. Spousal support is a deduction for the payer, and taxable income for the recipient if and only if it is in a written legal agreement
8. If you sold your interest in the family home, it is not taxable but must be declared.

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**Pricing**, all prices are before HST

## Base Rates: Personal Taxes

- \$147 per person
- \$270 for a married or common law couple
- \$107 for retired seniors with pension income only, or student)
- Tax follow up (audits, CRA requests for information) included for up to 30 minutes, you must email me and let me know you have a request
- Changes to Canadian Child Benefit, \$125

Base rate includes:

T4/T4A/T4Es, dependants and child care benefits, medical expenses, charitable donations, Ontario benefits application (Trillium), Home Buyers Plan, RRSP contributions, up to 25 slips/receipts per person, 15 minutes of support (phone/email/in person)

Additional costs for additional schedules/tax forms including, capital gains (starting at \$75) home use of office (\$50), personal use of work vehicles (\$50), Northern Residents Deductions (\$75), and T1OVP for overcontribution to an RRSP (\$75).

## Base Rates: Business Taxes

- \$355 business or farm (unincorporated)
- \$330 rental property
- \$230 home based daycares and micro businesses
- \$125 taxes for your employed spouse
- HST filing \$125/period
- T – slips \$125/up to 4, \$20 each additional
- ROE - \$125/ea
- Tax time bookkeeping \$85/hour

Base rate includes:

1 business, or 1 rental unit. 1 business use vehicle, business use of home deductions, COGS adjustment, up to 5 new capital purchases, and everything included in personal base rate. Additional costs for additional schedules and pages and bookkeeping that is not complete.

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