

Foreign Property includes - **Appendix D** :

Cash, funds in foreign bank accounts
Shares and bonds of foreign companies
Real estate situated outside Canada (except if owned exclusively for personal use)
Other (trademarks, patents, land use rights, gold bars, antiques, life insurance, trust.)

Do you own all foreign properties with total cost > CDN \$100,000 but ≤ \$250,000?

Do you own foreign property with a cost greater than CDN \$250,000?

[If yes, please provide details of foreign properties, monthly bank & investment statements.]

INCOME

Employment/ Commission (T4, T4A, T4PS, foreign income, or others)

[If you are planning to claim foreign tax credits, please provide us a copy of your Foreign Personal Income Tax Doc.]

Investment (T3, T5, T5013, T5008, foreign investment income, or others)

Pension/Taxable Benefit (T4E, T4A, T4RSP, T4RIF, T4A(OAS), T4A(P), Foreign pension, or others)

Disposition of Investments (eg. shares, bonds, real estate).

[Please provide Realized Gains / Losses Summary from the broker.]

Or, disposition of Investment property (please provide the details)

Rental Income (Please fill in a separately rental income and expense schedule - **Appendix C**)

Business Income. (Please fill in a separately self-employed income and expense schedule - **Appendix A**)

Please confirm if your foreign income was \$0 (Nil) in 2025?

[Please note that individuals resident in Canada are subject to Canadian income tax on worldwide income]

[If no, please provide your Foreign Personal Income Tax Doc. or the details (income type & amount)]

DEDUCTIONS

Employment Expenses. Please provide expense summary (**Appendix B**) and a signed T2200

RRSP. Please provide a copy of the RRSP contribution slips.

Home Buyers Plan – Repayment RRSP. Please provide last year Notice of (RE)Assessment;

Childcare Expenses. Please provide a copy of child care receipts

[If the child care services were provided by individual, please provide full name and SIN #]

Support Payments. Total support payments \$

Union or Professional Dues (if not included on T4). Please provide the details and amount \$

Investment Carrying Costs - Interest expenses for investment purposes \$

Investment Carrying Costs - Investment management fees for investment purposes \$

Moving Expenses. Please note that the new home is at least 40 kilometers closer to a new job

[If yes, please provide a summary of moving expenses incurred.]

CREDITS

Interest on Eligible Student Loan. Total interest paid on loan \$

Tuition Fees or Dependent's Tuition Fees. Please provide T2202 downloaded from school website

[If you are planning to transfer tuition credits from your child to yourself, please have the child sign on Part 3 of the T2202]

Charitable Donations/Political Contributions. Please provide a copy of the receipts.

Medical Expenses for Yourself, Spouse and Dependents. please provide a copy of receipts.

Disability Tax Credit for Yourself or Dependents.

[Need to have the doctor complete and sign T2201 form, if this is the first time to claim]

NOTES

Direct Deposit. If you want the tax refunds or benefits to be directly deposited into your bank account, please provide void cheque/direct deposit form.

First Time Apply for the GST/HST Credit (**For New Immigrant or First Time Filing Only**)

