



Canadian Personal Income Tax Return Checklist

Taxpayer Name:	Spouse's Name:		
Date of Birth:	Date of Birth:		
Email:	Email:		
Phone:	Phone:		
Address:	Children	SIN	Date of Birth
Marital Status:			

<i>Please Answer the Following Questions</i>			
Are you a Canadian citizen? If yes, can the CRA provide your name, address, and date of birth to Elections Canada?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
At any time during the year, did you own foreign property with a combined cost greater than \$100,000? (e.g. real property, securities, foreign bank account, etc.) <i>If yes, attach details.</i>	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
At any time during the year, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? <i>If yes, attach details (see below).</i>	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Do you wish to pension split if beneficial?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Have you sold or changed use of your principal residence during the year? (home or vacation property). <i>If yes, please provide sales documents.</i>	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Are you a first-time homebuyer this year?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Did you open a First Home Savings Account (FHSA) in the year?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Did you pay rent for a period of six months or more in 2025?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Have you signed and enclosed your Engagement Letter?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
How would you like to receive your copy of the tax return?	PDF (secured) <input type="checkbox"/> Paper <input type="checkbox"/>		
Do you authorize CRA to provide your full name, email, and postal code to BC Transplant so that they may contact you regarding organ and tissue donation? Note: This does not register you for organ donation.	Yes <input type="checkbox"/>	No <input type="checkbox"/>	

<i>Canadian and Foreign Sources of Income (provide slips, documents, or details)</i>		
Employment related income (T4, T4E)	<input type="checkbox"/>	Capital gains <input type="checkbox"/>
Investment income (T3, T5) including backup attachments	<input type="checkbox"/>	Provide proceeds, actual cost, commission fees, dates of acquisition and disposition of stocks/bonds/mutual funds, real estate, personal property, jewelry, works of art, etc. <input type="checkbox"/>
Pension/retiring allowance/other (T4A)	<input type="checkbox"/>	Business/professional income/expenses <input type="checkbox"/>
CPP/QPP/OAS (T4A(P)/T4A(OAS))	<input type="checkbox"/>	Auto expenses – including business/personal mileage <input type="checkbox"/>
RRSP/DPSP/RPP/RRIF (T4RSP/T4RIF)	<input type="checkbox"/>	Distributions from a foreign trust – if yes, attach the trust document <input type="checkbox"/>
Partnerships/tax shelters (T5013/T101)	<input type="checkbox"/>	
Rental income/expenses – specify length of stay	<input type="checkbox"/>	
Farming/fishing income/expenses	<input type="checkbox"/>	

Canadian and Foreign Sources of Income (provide slips, documents, or details)

Home office expenses:

Square feet: Office space _____ Total home _____

Visit CRA's website to review what expenses you can claim:

- Self-employed individuals – [CLICK HERE](#)
- Employees – [CLICK HERE](#) - note: you must have a Form T2200 from your employer to claim

Virtual currency – provide details of how the investment is held (eg: exchange, online platform, wallet).

Provide transaction details including buy/sell transactions, highest cost based during the year, gains/losses and other income earned.

Deductions and Credits (provide slips, documents, or details)

RRSP/pension contributions	<input type="checkbox"/>	Tuition fees/education expenses (include T2202A)	<input type="checkbox"/>
Union/professional dues	<input type="checkbox"/>	If transferring to parent, has child signed the T2202A?	<input type="checkbox"/>
Childcare expenses	<input type="checkbox"/>	(include T11A for tuition paid to university outside of Canada)	
Moving expenses	<input type="checkbox"/>	Interest paid on student loans	<input type="checkbox"/>
Support payments made	<input type="checkbox"/>	Medical/attendant care expenses/travel medical insurance – please provide pharmacy summaries for prescriptions	<input type="checkbox"/>
Accounting/legal/investments counsel fees	<input type="checkbox"/>	If aged 65 or disabled: home accessibility expenses	<input type="checkbox"/>
Interest paid on investments	<input type="checkbox"/>	Income tax instalments/foreign taxes paid	<input type="checkbox"/>
Deductible employment expenses (include T2200)	<input type="checkbox"/>	Number of days spent in the US if greater than 120 in current or two previous years	<input type="checkbox"/>
Charitable donations	<input type="checkbox"/>	Prior year Notice of Assessment or Notice of Reassessment	<input type="checkbox"/>
Political/municipal contributions	<input type="checkbox"/>	Renovations to create a second unit in your home for the multi-generational home renovation tax credit – please provide receipts	<input type="checkbox"/>

Please add Additional Information