

# 2025 T1 Canadian Personal Income Tax Checklist

IDENTIFICATION AND CONTACT INFORMATION (Taxpayer 1)				
Full Name	SIN		Phone	
Birthdate MM/DD/YY	Citizenship		Email	
SPOUSE INFORMATION (Taxpayer 2)				
Full Name	SIN		Phone	
Birthdate MM/DD/YY	Citizenship		Email	
DEPENDENT(S)				
Full Name	Birthdate MM/DD/YY	SIN	Citizenship	Custody
Full Name	Birthdate MM/DD/YY	SIN	Citizenship	Custody
IF ANY CHANGES				
Current Address				
Marital Status (as of Dec. 31/23)		Date of Change in Marital Status		
INVESTMENT ADVISOR				
Name		Email		Phone

**Please review the list of income and deductions/credits below, and check off those items that apply to you and your spouse.**

**Taxpayer 1    Taxpayer 2**

**Taxpayer 1    Taxpayer 2**

## Income

- |                          |                          |   |                          |                          |  |
|--------------------------|--------------------------|---|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Employment Income (T4 or T4A Slips)               | <input type="checkbox"/> | <input type="checkbox"/> | Rental Income and Expenses   |
| <input type="checkbox"/> | <input type="checkbox"/> | Pension Income (T4A, T4OAS, T4AP Slips)           | <input type="checkbox"/> | <input type="checkbox"/> | Capital Gains (Please indicate the cost and proceeds of any asset disposals) |
| <input type="checkbox"/> | <input type="checkbox"/> | Employment Insurance Benefits (T4E Slips)         | <input type="checkbox"/> | <input type="checkbox"/> | Self-Employment Income and Expenses  |
| <input type="checkbox"/> | <input type="checkbox"/> | Investment Income – Interest Dividends (T5 Slips) | <input type="checkbox"/> | <input type="checkbox"/> | Retirement Income (RRSP, RRIF, Annuity)                                      |
| <input type="checkbox"/> | <input type="checkbox"/> | Estate/Trust/Mutual Fund Income (T3 Slips)        | <input type="checkbox"/> | <input type="checkbox"/> | Other Income, Support Received, Death Benefits, etc                          |
| <input type="checkbox"/> | <input type="checkbox"/> | Partnership Income (T5013)                        | <input type="checkbox"/> | <input type="checkbox"/> |  |

## Deductions and Credits

- |                          |                          |  |                          |                          |   |
|--------------------------|--------------------------|--|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | RRSP Contributions   | <input type="checkbox"/> | <input type="checkbox"/> | T2201 Slips (Disability Deductions, Self or Dependents) |
| <input type="checkbox"/> | <input type="checkbox"/> | Tuition Receipts (T2202 Form)  | <input type="checkbox"/> | <input type="checkbox"/> | Charitable Donations (need tax slips)                   |
| <input type="checkbox"/> | <input type="checkbox"/> | Union, Professional Dues Receipts  | <input type="checkbox"/> | <input type="checkbox"/> | Student Loan Interest Statement                         |
| <input type="checkbox"/> | <input type="checkbox"/> | Child Care Expenses (SIN, Name and Address of Caregiver)                                   | <input type="checkbox"/> | <input type="checkbox"/> | Eligible Support Payments                               |
| <input type="checkbox"/> | <input type="checkbox"/> | Moving Expenses  | <input type="checkbox"/> | <input type="checkbox"/> | Other Deductions (Carrying Charges, Interest)           |
| <input type="checkbox"/> | <input type="checkbox"/> | Medical Expenses   | <input type="checkbox"/> | <input type="checkbox"/> | Digital new subscription tax credit                     |
| <input type="checkbox"/> | <input type="checkbox"/> | T2200/TLI2 Forms (Employment Expenses - Include Statement of Exp.)                         | <input type="checkbox"/> | <input type="checkbox"/> | Political Donations (need tax slips)                    |
| <input type="checkbox"/> | <input type="checkbox"/> | Amount of Property Tax/Rent Paid in Year (include Landlord's Name and Address of Property) |                          |                          |   |

## Other

- |                          |                          |   |                          |                          |  |
|--------------------------|--------------------------|---|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Copy of 2024 Notice of (Re)Assessment                                     | <input type="checkbox"/> | <input type="checkbox"/> | Do you authorize CRA to prove information about you to Elections Canada? (Check for 'Yes')   |
| <input type="checkbox"/> | <input type="checkbox"/> | Income Tax Installments, Final Statement Indicating 2025 Total            | <input type="checkbox"/> | <input type="checkbox"/> | List of Foreign Property Owned if Cost > \$100,000 (T1135)   |
| <input type="checkbox"/> | <input type="checkbox"/> | Details of Canada Savings Bonds Purchases/Cashed in and on Hand           | <input type="checkbox"/> | <input type="checkbox"/> | Are you a U.S. Green Card Holder? (Check for 'Yes')  |
| <input type="checkbox"/> | <input type="checkbox"/> | Direct Deposit my Refund (Enclose 'Void' Cheque for Account Info)         | <input type="checkbox"/> | <input type="checkbox"/> | Did you spend more than 120 days in the U.S. during 2025? (Check for 'Yes') Please indicate the total number of days spent in the U.S. |
| <input type="checkbox"/> | <input type="checkbox"/> | Details of any Residence Sold During the Year                             | <input type="checkbox"/> | <input type="checkbox"/> |  |
| <input type="checkbox"/> | <input type="checkbox"/> | Have you received any private corporation dividends not exempt from TOSI? | <input type="checkbox"/> | <input type="checkbox"/> |  |