

INVISION CHARTERED PROFESSIONAL ACCOUNTANTS

2025 GENERAL PERSONAL TAX RETURN CHECKLIST

Please complete the following.

Name: _____ Birth Date: _____ Marital Status: _____

Name: _____ Birth Date: _____

Address: _____

Phone #: _____

Please advise of any changes in the status of dependants throughout 2025.

If you would like us to email your tax return and invoice to you (instead of mail), please provide your email address(es): _____

PLEASE CIRCLE APPLICABLE ITEMS AND ATTACH SUPPORTING DOCUMENTATION

Visit our website: www.invisioncpa.com for additional worksheets

Yes/No Did you make any tax installments for 2025? (\$_____) (\$_____)

Yes/No Please indicate if you will be away in March/April (NO/YES - Dates:_____)

Yes/No Did you change banks? If yes, please advise the CRA to update your direct deposit info.

Yes/No Have you signed the enclosed engagement letter?

Principal Residence (Please provide applicable description of property, year of acquisition, and proceeds of disposition)

Yes/No Did you purchase or sell your home or vacation property? (includes property outside of Canada)

Yes/No Did you begin renting out a portion or all of your home or vacation property?

Yes/No Did you convert a rental property into your principal residence?

Income (Please provide all information slips)

Yes/No T4 - Employment income

Yes/No T3 - Trust income

Yes/No T5 - Interest and dividends

Yes/No T5013 - Partnership income

Yes/No T4A(OAS) - Old age security

Yes/No T4A(P) - Canada Pension Plan

Yes/No T4A - Pensions and other income (indicate if patronage income is from personal consumption)

Yes/No T4E - Employment insurance

Yes/No T4FHSA - FHSA contributions and/or withdrawals

Yes/No T4RSP - RRSP withdrawals

Yes/No T4RIF - RRIF payments

Yes/No All other tax slips not mentioned above

Yes/No Business income - (Complete business worksheets or provide a statement of income and expenses)

Yes/No Farm income - (Complete farm worksheets)

Yes/No Rental property - (Complete rental worksheet)

Yes/No Spousal support payments received during 2025 (\$_____)

Yes/No Scholarships, bursaries or grants (\$_____)

Yes/No Other sources of income, not reported on a T-slip or included above (\$_____)

Yes/No Purchases or sales of investments, including cryptocurrency transactions (excluding RRSP and TFSA). Please provide your trading summary from your investment statements for sales detail and original cost information

Deductions (Please provide all applicable receipts)

- Yes/No RRSP contributions (including purchases and contributions Jan 1, 2026 - Mar. 2, 2026)
- Yes/No RRSP withdrawal for the Home Buyer's Plan or Lifelong Learning Plan
- Yes/No FHSA contributions made in 2025
- Yes/No Investment expenses (e.g. interest or management fees)
- Yes/No Union, professional or like dues
- Yes/No Child care expenses (includes camps) - provide social insurance number if paid to individuals
- Yes/No Moving expenses (if move is greater than 40 Kms for work)
- Yes/No Spousal support payments paid during 2025 (\$_____)
- Yes/No Employment expenses incurred for which you are not reimbursed
- Yes/No Northern Residents travel - complete attached travel worksheet. (Available to all residents in Northern Zones)

Non - Refundable Tax Credits (Please provide all applicable receipts)

- Yes/No Tuition receipts (T2202), exam fees and other training/course fees
- Yes/No Interest paid on student loans in 2025 (carry forward up to 5 years)
- Yes/No Medical expenses (complete attached worksheets)
- Yes/No Donations or Political contributions

Foreign Property (Please circle the appropriate answer)

- Yes/No Did you own foreign property greater than \$100,000? (T1135)
- Yes/No Do you have any dealings with non-resident trusts or corporations? (T1141/T1142)