



Truong Tax and Accounting Services Ltd.

(780) 999-9054 • terry@truongaccounting.ca • www.truongaccounting.ca

2025 PERSONAL INCOME TAX CHECKLIST

To ensure you get every tax credit and deduction you are entitled to and to assist you in gathering and organizing your tax documents and working papers. Please complete the checklist and questionnaires below. The checklist is not exhaustive but is intended to cover the most common personal tax situations.

Principal Residence Reporting

All taxpayers who sell or dispose their principal residence must report on their income tax return. There are substantial penalties for not reporting. Please complete the questionnaire below.

Foreign Property Reporting

Canadian resident individuals who held certain property outside Canada with a total cost of more than \$100,000 CAD at any time in the tax year must comply with special reporting to the CRA. There are substantial penalties for non-compliance. Please complete the questionnaire below.

Important Dates

March 2, 2026	Final date for contributing to an RRSP for 2025 tax year
March 15, 2026	Payment due date for first quarterly 2026 personal income tax instalment
April 30, 2026	Filing due date for 2025 T1 personal income tax return for most individuals and payment of taxes owing
June 15, 2026	Filing due date for 2025 T1 personal income tax return for self-employed individuals

NEW CLIENTS (for returning clients, complete changes from 2024)

Taxpayer _____ DOB _____

Spouse _____ DOB _____
(If applicable)

Address _____

Telephone Home _____ Work _____ Cell _____

E-mail _____

Marital Status Single Married Common-law Separated Divorced Widowed

If marital status changed during the year, please provide

Date of change _____ Nature of change _____



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Spouse's or common-law partner's net income from line 23600 (if I am not doing tax return) _____

Dependant children

Name	Date of Birth	SIN	Relationship
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Province of residence on December 31, 2025 _____

Are you a Canadian Citizen? Yes No

If you are a Canadian Citizen, do you authorize Canada Revenue Agency to provide information to Elections Canada? Yes No

Did you sell or dispose your principal residence in 2025? Yes No

If yes, please provide basic information and documents of the property: date of purchase, original cost, proceeds of disposition, and address.

Did you at any time during 2025 own certain property (Rental property, investment accounts, shares in non-Canadian companies, etc.) outside Canada with total cost greater than \$100,000 CAD? Yes No

If yes, please provide details of ownership of foreign assets.

FOR NEW CLIENT

- Please provide a copy of your 2024 personal income tax return
- Please provide a copy of your 2024 notice of assessment or reassessment
- If you made income tax instalments for 2025, please provide statement and total instalment made

GENERAL INCOME

- T4 - Statement of remuneration paid
- T4A - Commission, self-employment and other income
- T4E - Statement of employment insurance and other benefits
- T5007 - Statement of benefits



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PENSION INCOME

- T4A - Statement of pension, annuity and other income
- T4A(P) - Statement of Canada Pension Plan benefits
- T4A(OAS) - Statement of Old Age Security
- T4RSP - Statement of RRSP income
- T4RIF - Statement of income from a RRIF

INVESTMENT INCOME/DEDUCTIONS

- T3 - Statement of trust income
- T5 - Statement of investment income
- T4PS - Statement of profit sharing plan allocations and payments
- T5013 - Statement of partnership income
- If you have a non-registered investment portfolio, please provide statement of realized gain/loss report for disposition in 2025
- Investment counsel / management fees
- Interest paid on investment loans (letter from financial institution stating the purpose of the loan and the amount of interest)
- Allowable business investment losses

SELF-EMPLOYMENT/BUSINESS/PROFESSIONAL/RENTAL INCOME

- Please provide details of self-employed, business or professional income and expenses, please download Business / Professional / Self-Employed Worksheet from my website at <http://www.truongaccounting.ca/resources/>
- Please provide details of income and expenses for rental properties, please download Rental Income Expenses Worksheet from my website at <http://www.truongaccounting.ca/resources/>
- Please download other worksheets from my website at <http://www.truongaccounting.ca/resources/>



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DEDUCTIONS

- Registered Retirement Savings Plan (RRSP) contribution receipts
- First Home Savings Account (FHSA) contribution receipts
- Professional or union dues receipts
- Child care expense receipts which must include the name, address and S.I.N. of the caregiver
- Receipts and details of moving expenses
- Details of alimony, separation allowances, child maintenance
- Clergy residence deductions (Signed Form T1223)
- If you are an employee and entitled to deduct employment expenses, form T2200 Declaration of Employment Conditions must be signed by your employer, please download Employment Expenses Worksheet from my website at <http://www.truongaccounting.ca/resources/>

TAX CREDITS

- Charitable donation receipts
- Political donation receipts
- Medical expenses for yourself, spouse and dependants paid in 2025 (Obtain annual printouts of prescriptions from your pharmacies or drugstores)
- T2202 - Tuition and Enrolment Certificate
- Interest paid on student loans
- Eligible for first-time home buyer credit
- Receipts for eligible home renovations to improve accessibility for seniors
- Disability tax credit form (T2201)
- Supplies purchased up to \$1,000 by eligible educator