

2025 Personal Tax Information Checklist

Use this organizer to prepare your tax package. This guide is for planning support only and is not legal or tax advice.

Taxpayer

Full name:

Current address:

Best phone number:

Primary email address:

Spouse or common-law partner

Pension income splitting requested with spouse/partner

Full name:

Phone number:

Email address:

Household and dependents

Marital status (include date of any status change):

Dependents

For each dependent: full name, SIN, date of birth, and email if applicable.

Installments, foreign holdings, and property

- Foreign property over \$100,000 at any time in 2025

Examples include non-Canadian bank accounts, foreign securities, foreign real estate, foreign insurance, and similar holdings.

- Principal residence or other property sold/gifted during 2025

2025 installment payments total:

Sale proceeds amount:

Original acquisition year:

Income Documents

- Employment income slips (for example T4).
- Retirement and government income slips (OAS/ CPP/pension/RRSP/RRIF as applicable).
- Employment Insurance slips.
- Other income slips (for example T4A).
- Investment income slips (interest, dividends, trust, partnerships).
- Business or rental activity summary, including revenue, expenses, and fixed-asset additions/disposals.
- Business-use-of-home and vehicle business mileage support where relevant.
- Short-term rental activity in 2025, including compliance/permit status dates.
- Capital gains/losses support: broker gain/loss report, T5008, and property sale details with purchase/sale support.
- Alimony or support received (include agreement if new/updated).
- Foreign-source or other non-standard income details.

Deductions and Credits

- RRSP and FHSA contribution records.
- Union or professional dues receipts.
- Childcare expense receipts.
- Moving expense receipts and move details.
- Employment expense support, including required employer forms.
- Support payments made (agreement details if new/updated).
- Interest and carrying charges related to investment income.
- Federal/provincial political contribution receipts.
- Charitable donation receipts.
- Medical and attendant care receipts, insurance premiums, pharmacy/dental summaries, and travel support where eligible.
- Disability Tax Credit support (including form documentation if first-time).
- Tuition slips and transfer details where applicable.
- Student loan interest slips.
- First-time/new home buyer credit support (purchase documents).
- Volunteer firefighter/search and rescue eligibility letter.
- Children's wellness receipts (if applicable in your jurisdiction/year).

Other Notes

If you are unsure whether something is taxable or deductible, include it in your package and note it below for review.

Checklist version: 2025 tax year organizer. Keep copies of all slips and receipts submitted with your package.

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