



2025 T1 Personal Tax Organizer

To assist in the preparation of your personal income tax return, please complete this mandatory checklist and return it to our office along with your supporting financial documentation.

PERSONAL INFORMATION (Taxpayer 1)		PERSONAL INFORMATION (Taxpayer 2)	
Name:		Name:	
SIN #:		SIN #:	
Date of Birth (MM/DD/YY):		Date of Birth (MM/DD/YY):	
Phone #:		Phone #:	
Email:		Email:	
Address:		Address:	
City:		City:	
Province:	Postal Code:	Province:	Postal Code:

OTHER INFORMATION						
Did your marital status change from last year's return?	Y	N	If yes, date status changed (MM/DD/YY)			
Marital Status:	Single	Married	Common-Law	Separated	Divorced	Widowed
Are we preparing a tax return for your spouse?	Y	N	N/A			
If we are NOT preparing a tax return for your spouse, please provide income amount from line 236 \$						
<i>Please list all dependents below:</i>						
Dependent's Name	Relationship	Date of Birth (MM/DD/YY)	SIN #	Net Income During Year		
1.						
2.						
3.						
Are you a Canadian citizen?			Y	N		
Do you authorize the CRA to provide information about you to Elections Canada?			Y	N		
Details of any residence sold in 2025 (provide: purchase cost/date, sale price/date)			Y	N		
Do you own/hold foreign property with a total cost of more than \$100,000.00 CAD (T1135)			Y	N		
Have you made installment payments for the tax year? If yes, amount? \$			Y	N		
Are you a U.S. Citizen or Green Card Holder?			Y	N		
Did you spend more than 120 days in the U.S. during 2025? If yes, how many days			Y	N		
NOA (Notice of Assessment or Re-Assessment) for previous tax year? Please provide a copy			Y	N		

SOURCES OF INCOME (Check all that apply and provide tax slips)

- Capital Gains (T5008, trading summary, or costs & proceeds)
- Employment Insurance Benefits (T4E)
- Employment Income (T4, T4A)
- Investment Income/Interest or Dividends (T3, T5)
- Other Income: Support Received, Death Benefits, etc.
- Partnership Income (T5013)
- Pension Income or Foreign Pension (T4A, T4OAS, T4AP)
- Rental Income
- Rental Operations
- Retirement Income (T4RSP, T4RIF, Annuity)
- RRSP Withdrawals (T4RSP)
- Sale of Investments (T5008)
- Scholarships & Bursaries (T4A)
- Self-employed Income
- Social Assistance Benefits (T5007)
- Workers Compensation Benefits (T5007)

DEDUCTIONS AND CREDITS (Check all that apply and provide tax receipts or supporting documents) * *Note: If you have rental, employment, self-employment expenses, please access your personal portal for worksheets to aid in the summary of this information for your tax return.*

- Charitable Donations
- Childcare expenses & Camps
- Digital news subscription
- Disability claim (T2201 form)
- Eligible support payments
- Employment expenses (T2200 or TL2 form)
- First Time Home Buyers amount
- Medical expenses
- Moving expenses
- Other deductions (carrying charge, interest, etc.)
- Political party contributions
- Property tax or Rent Receipts
- Rental Expenses
- RRSP Contributions
- RRSP Contributions (Spouse)
- Tuition receipts (T2202 form)
- Union dues & professional fees, teaching supplies

PROCESSING QUESTIONS

Do you want your tax refund deposited directly to your bank account?

(If yes, please provide void cheque or direct deposit form)

Y

N

