

Personal Tax Information & Checklist

Primary Contact Information	Spouse Information (if applicable)
Name:	Name:
Social Insurance No:	Social Insurance No:
Date of Birth:	Date of Birth:
Cellular:	Cellular:
Home Phone:	Home Phone:
Email:	Email:

How would you like to receive your tax return? ☒ Electronically by email ☒ Paper

How do you prefer to sign your forms? ☒ Electronically via DocuSign ☒ Paper

Mailing Address: _____

Did you move during the year? Yes ___ No ___ Date of move: _____

New mailing address: _____

Province of Residence on December 31st _____

Have either of the following changed?:

☐ Marital Status: _____ ☐ Last Name: _____
Include Date of change *New Last name*

Dependent Name & Income Amount	Relationship	Social Insurance No.	Date of Birth		
			Year	Month	Day

☐ Did you or your spouse have any loans, dispositions, and gifts of property to children, spouse or other non-arm's length persons? Please provide details of loans or gifts of money or other property.

	Primary		Spouse	
	YES	NO	YES	NO
Are you a Canadian citizen?				
Do you authorize CRA to give your name, address, date of birth and citizenship to Elections Canada to update the National Register of Electors?				
Do you have, or share custody of a child after a relationship breakdown? Does this child live with you? Yes ___ No___ If yes, how often? Full-time ___ Part-time ___				
Has your banking information changed since your last direct deposit from CRA? If yes, please provide a VOID cheque or a Direct Deposit form from your bank.				
Did you pay personal tax instalments during the year? If yes, \$ _____				
Did you open a <i>First Home Savings Account</i> (FHSA) in 2025? If so, did you make any contributions, transfers, or withdrawals in 2025?				
Did you withdraw RRSP's or FHSA's to purchase a home for you or your spouse?				
Did you withdraw RRSP's to finance full-time education for you or your spouse?				
Did you earn any tips in 2025? If yes, please provide total tips received \$ _____				
Have you ever transferred or loaned property to a foreign trust, or received funds or property from a foreign trust (at any time after 1995)? Or, did you own more than 1% of a foreign corporation or foreign trust at any time during the year, and together with related parties own more than 10%?				
Did you sell or dispose of assets during that may qualify for the Lifetime Capital Gains Exemption (LCGE)?				
Did you own foreign property with a cost of \$100,000 or more at any time during the year? (includes U.S. property and investment portfolios with stocks or mutual funds with U.S. or International holdings)				
Did you sell bitcoin or any other crypto-currency during the year?				
Did you sell property (principal residence, rental property, vacation home, etc.) during the year? Date of sale: _____ Date of sale: _____ Selling price: \$ _____ Selling price: \$ _____				
Do you have access to CRA's My Account for Individuals?				

Please provide details/documentation for any item where you check "yes".

If this is the first year we are preparing your return, or if we do not have the following, please provide:

☐

Prior year's personal income tax returns

☐

Prior year's notices of assessment and reassessment(s), if applicable (all pages)

If we are not preparing your spouse's return, what is their net income from line 236 of their prior year's tax return?
Were they self-employed?

☐

You are applying for the GST Credit

Once the information is compiled, contact our office at **(306) 975-9500** or email **bdonsberger@pwmprivate.com** to schedule an appointment or if you have questions. Alternatively, documents can be uploaded to our **secure link** or dropped off at:

Saskatoon: 205-210 Wellman Crescent (no appointment necessary)

Prince Albert: 1061 Central Avenue (by appointment only)

Check applicable boxes below and provide supporting slips & documents:

Income	Primary	Spouse
T4 - Employment Income		
T4A - Pension & Other Income (for self employed business, rental and farm income see pages 5-7)		
T4AP - CPP Benefits		
T4A OAS - Old Age Security		
T4E - Employment Insurance Benefits		
T4RSP / T4FHSA - RRSP / FHSA Income		
T4RIF - RRIF Income		
T5 - Interest and Dividend Income		
T3 - Estate / Trust / Mutual Funds Income		
T5007 - Social Assistance / WCB		
T5008 - Statement of Security Transactions - provide cost when purchased		
T5013 - Limited Partnership Income		
Alimony / Spousal Support received		
Scholarship, Fellowship, Bursary		
Foreign sources (ex. US Social Security)		
Capital Gains / Losses - provide Dec 31 investment statements and year end reports from your advisor		
Bitcoin or other cryptocurrency transactions		
Income from sources of the sharing economy such as <i>Skip the Dishes</i> , <i>Airbnb</i> , <i>VBRO</i> , <i>Uber</i> , or other online or social media activity		
Other sources of income:		

Deductions, Tax Credits and Expenses	Primary	Spouse
RRSP / FHSA contribution receipts		
Union, professional and like dues		
Child care expense		
Employment expenses – T2200 required		
Moving expenses		
Spousal and/or child support paid		
Adoption related expenses		
Charitable donations		
Political donations		
T2202 Tuition and education		
T2202 Tuition transferred from dependent		
Interest paid on Student Loans		
Are you a first-time home buyer?		
Caregiver amount		
Investment counsel and management fees		
Eligible educator school supply tax credit: Teachers / Early Childhood Educator school supplies		
Interest on money borrowed to purchase investments		
Pension Split: Spouses may jointly elect to split certain pension income reported by the other spouse		
Digital news subscription tax credit		
Canada Training Tax Credit		
Home Accessibility Tax Credit: Home renovations for disabled person or senior citizen		
Labour mobility deduction for eligible tradespeople working in construction industry at a temporary location		
Multigenerational home renovation tax credit		
Tools acquired by tradespersons and eligible apprentice mechanics		
Travel costs for tradespersons engaged in construction at site at least 120km away from residence		
Loss on shares or loss on loans to a private company		

☐ Medical Expenses

Applies if you travelled **40 km or more one-way** to obtain medically necessary treatment that was **not available** locally. Receipts and details are required.

- Medical and dental expenses paid (receipts required)
- Transportation costs (vehicle, airfare, bus, taxi)
- Meals and accommodation (if travel was 80 km or more one-way)
- Attendant travel costs (if medically required)
- Costs paid for surrogate mothers and fertility treatments

☐ Private Health Plan Premiums (PHSP)

Applies if you paid the premiums personally or are self-employed. If your employer paid the premiums, do not claim them personally.

☐ Disability Tax Credit (T2201)

May apply if you or a dependent has a severe and prolonged impairment that markedly restricts daily activities, or requires life-sustaining therapy, and a medical practitioner has certified (or can certify) the condition on Form T2201. Approval may be retroactive and can affect other credits and benefits.

Saskatchewan-Specific Credits, Programs & Reporting (Complete only if applicable)

☐ **Saskatchewan Home Renovation Tax Credit**

Applies if you incurred eligible home renovation expenses for a principal residence in Saskatchewan during the year.

☐ **Saskatchewan Active Families Benefit**

Applies if you paid eligible registration or membership fees for children's sports, arts, cultural, recreational, or fitness activities.

☐ **Saskatchewan Graduate Retention Program (GRP)**

Applies if you completed post-secondary education and may be eligible for the Saskatchewan Graduate Retention Program or have unused amounts carried forward from prior years.

Self-Employment & Business Information

Applies if you earned income as a sole proprietor, independent contractor, professional, or from any business activity (including internet and social media) not reported on a T4. Please provide details and supporting documents where applicable.

- 1. Self Employed and Business Income Sources and Amounts**
- 2. Business Name (if applicable) & type of business or activity**
- 3. Inventory (start & end of year)**
- 4. Accounts Receivable/Accounts Payable Details**
- 5. Business Expenses** (Ex. supplies, advertising, insurance, professional fees, meals, travel, phone, internet, interest, bank charges).
- 6. Home Office Expenses** (applies if you are self-employed, farming, or required by your employer to work from home and have a signed T2200/T2200S).
 - a. Square footage of home, Square footage of workspace, & Type of workspace (exclusive / shared)
 - b. Rent or ownership
 - c. Utilities, insurance, maintenance, Mortgage interest (not principal), Property taxes
 - d. Internet (business portion)
- 7. Vehicle Expenses** (applies if you used a vehicle for self-employment purposes).
 - a. Business use percentage
 - b. Kilometre log maintained
 - c. Business Assets
- 8. Business Assets** (applies if you purchased, sold, or disposed of business assets during the year).
 - a. Examples include equipment, tools, computers, furniture, or vehicles.
- 9. GST/HST & PST** (applies if you are registered for GST/HST or SK PST related to business activities).
Access Code: _____ GST Number: _____
- 10. Self-Employment Notes / Additional Information we should know:**

Rental Property Information

Please provide details and supporting documents where applicable.

- 1. Type of rental** (Long-term, Short-term rental (e.g., Airbnb), Room rental / shared accommodation)
- 2. Rental Property Details** (applies if you owned, acquired, or disposed of rental property).
 - a. Property address(es)
 - b. Ownership percentage
 - c. Date acquired / date sold (if applicable)
- 3. Rental Expenses** (applies if you incurred expenses to earn rental income).
Examples include property taxes, insurance, utilities, repairs, management fees, advertising, accounting/legal fees, mortgage interest, condo fees.
- 4. Capital Cost Allowance (CCA)** (applies if you are claiming or have claimed depreciation on rental property or rental assets).
- 5. Change in Use / Personal Use**
Examples include principal residence converted to rental, rental converted back to personal use, or partial rental (basement suite, room rental).
- 6. GST/HST on Rental Property** (applies if you charged or paid GST/HST related to rental property).
Access Code: _____ GST Number: _____

Rental Notes / Additional Information we should know:

Farm Income & Agriculture Add-On (SK)

Please provide details and supporting documents where applicable.

1. Farm Income

Applies if you earned income from farming activities, including crop, livestock, or mixed farming operations. Please provide:

- a) Farm income statements or summaries
- b) Grain tickets and/or livestock sales records
- c) Other farm-related income

2. Farm Expenses

Applies if you incurred expenses to earn farm income during the year. Examples include (but are not limited to): Seed, fertilizer, chemicals, fuel, utilities, repairs, custom work, hired labour, land or equipment rent, insurance, and interest.

3. Farm Program Payments

Applies if you received payments or benefits from agricultural programs during the year. Examples include: AgriStability, AgriInvest, crop insurance, and other federal or Sask farm programs.

4. Inventory & Prepaid Expenses

Applies if you had farm inventory or prepaid expenses at year-end. Examples include: Grain, livestock, feed, seed, fertilizer, or chemical prepaids.

5. Farm Assets

Applies if you purchased, sold, traded, leased, or disposed of farm assets during the year. Examples include Machinery, equipment, vehicles, or farmland.

6. GST/HST Related to Farming

Access Code: _____ GST Number: _____

Applies if you are registered for GST/HST or claimed farm-related rebates

Notes: Please include details we should know about your farming operation.