

2025 PERSONAL INCOME TAX QUESTIONNAIRE

These questions are on the personal income tax form. Please answer the following questions on behalf of each member of your family:	YES	NO
1) Did you sell your home or vacation property during the year? If yes, please provide legal address, proceeds and year of acquisition. Failure to disclose the sale of your home or vacation property could result in large tax penalties. CRA now requires this sale to be reported even if no tax is payable. In addition, please indicate if you have a change in use of your property. This could include, for example, converting some or all of your principal residence into an income-earning property.		
2) Are you a Canadian Citizen? If you are a U.S. citizen, dual citizen or green card holder, you have a U.S. tax filing obligation.		
3) As a Canadian Citizen, do you authorize CRA to provide your name, address, date of birth and citizenship to Elections Canada for the National Registry of Electors?		
4) Do you authorize the CRA to provide your name and email address to Ontario Health so that Ontario Health (Trillium Gift of Life) may contact you or send you information about organ and tissue donation?		
5) Did you own or hold foreign assets at any time in 2025 with a <u>total cost of more than CAN \$100,000</u>? Did you earn any income or realize any gains from foreign assets in 2025? Foreign property/assets include cash, stocks, bonds, digital currency (such as Bitcoin), trusts, partnerships, real estate and income producing property (rental property). It does not include foreign personal use properties or investments held through Canadian mutual funds. If yes, then Form T1135 or Form T1142 must be completed, signed and filed with Canada Revenue Agency on or before the T1 due date, or penalties will apply. Penalties can reach \$2,500 for each year.		
6) At any time in 2025, did you receive funds or property from, or were you indebted to a non-resident trust in which you were beneficially interested? If yes, the Form T1142 must be completed, signed and filed with Canada Revenue Agency on or before the T1 due date, or penalties will apply. Penalties can reach \$2,500 for each year.		

What is your preferred method of obtaining your finalized personal income tax return? Note: When you sign on DocuSign, you will get an email with a link to the Completed Document. You can click on this link and download your signed copy of the tax return and any other items.	<input type="checkbox"/> DocuSign <input type="checkbox"/> Hard copy
Please advise us of any changes to your marital status, address, email, cell phone, and of any children born in 2025: 	
Other Notes: 	

Signature: _____

Date: _____

Name: _____

Please check items that you have attached:

INCOME

- Income Reporting from Digital platform operators (AirBnb, Etsy, Uber, DoorDash, etc.)
- Employment, Retiring Allowance – T4
- Old Age Security – T4A(OAS), Canada Pension Plan benefits – T4A(P) and Employment Insurance – T4E
- T4A - Pensions, Registered Education Savings Plan income, CERB, scholarships, etc.
- Interest, Dividends and other Investment Income – T5/T600
- Mutual Funds and other Trust Income – T3
- Limited Partnership – T5013
- Business or Professional – Summary of income and expenses. See calculation tools under Resources on our website
- Do you earn income from website/webpages? See our website for more information.
- Rental Property Income (if applicable, attach details of property purchases and sales). See Resources / forms on our website.
- Capital Gains/Losses – Did you dispose of any capital properties this year? Please provide your gain/ loss summary for stock transactions. Attach copies of sales details and original purchase documentation for real estate transactions.
- Alimony received (provide copy of post-April 30, 1997 agreement or election, if changed or not previously provided)
- Other Income (e.g., stock options, gains/losses from crypto transactions, annuities, scholarships, bursaries, research grants, RRSPs – attach T4RSP, T4PS, T4RIF, T4FHSA, Workers' Compensation benefits). T10 slip – Pension Adjustment Reversal details

DEDUCTIONS/CREDITS

- If you earned income from a short-term rental, was the rental operation compliant with all provincial and municipal licensing, permitting and registration requirements by December 31, 2025? If not, deductions against gross rental revenues will not be allowed.
- Details on repayments of COVID-19 support payments in 2025.
- Multigenerational Home Renovation Tax Credit - a refundable credit to assist with the cost of renovating an eligible dwelling to establish a secondary unit that enables a qualifying individual (a senior or an adult who is eligible for the disability tax credit) to live with a qualifying relative.
- First Home Savings Account (FHSA) – You can claim FHSA contributions you made by December 31, 2025, as an FHSA deduction on your 2025 income tax and benefit return.
- Working from home deduction – Flat rate method not allowed anymore. Please summarize your home expenses and provide signed T2200 form from your employer (form required).
- Commission and employment expenses (include details and T2200, T2200S, T777S, TL2) Note: Include cost of tools.
- Registered Retirement Savings Plan contributions (attach receipts)
- Registered Retirement Savings Plan withdrawals under the Home Buyer Plan or the Lifelong Learning Plan
- Annual union, professional dues (attach receipts)
- Child care expense (attach receipts):
 - (a) for individual providers, include S.I.N. and address;
 - (b) for overnight camps, indicate number of weeks that were in-residence
- Attendant care expenses (attach receipts)
- Allowable business investment losses (refer to Capital Gains/Losses above)
- Moving expenses (attach receipts). Did you move 40km closer to a new work location?
- Alimony or separation allowances paid (include name(s), SIN and address(es) of recipient(s); attach copy of agreement or court order for spousal support which was signed on or after May 1, 1997 or election).
- Carrying charges (investment counsel fees, interest on money borrowed to earn dividends and interest, limited partnership investments)
- Federal and provincial political contributions (attach receipts)
- Charitable donations (attach receipts). Note: Identify donations of securities for special tax relief.
- Medical expenses (attach receipts) and details of private health insurance premiums, including amounts paid while traveling (**NOTE: Your pharmacy will provide you with a summary of all prescriptions for your family for the year**)
- Disability deduction for you or dependent (if first time claim, attach T2201 signed by physician).
NOTE – Individuals with type 1 diabetes will be deemed to meet the requirements to claim the disability tax credit.
- Tuition fees (attach T2202/T2202A including amounts that can be transferred from dependents) Note: These can be obtained online from most universities and colleges.
- For dependent persons, please attach list and indicate for each dependent: name, address (if different), relationship, birth date, S.I.N., and net income. Note infirmity, if any.
- Adoption expenses – maximum is \$19,580 for each child.
- Home buyers' credit – let us know if you are a first-time home buyer. Address: _____; who will claim? _____.
- Home Accessibility Tax Credit – age 65 and over or disabled (credit is 15% of eligible expenses up to \$20,000 per year).
- Educator school supplies Tax Credit – provide receipts up to \$1,000 and certification from school authority.

OTHER

- 2025 Instalments (attach February 2026 notice). Total remitted: \$ _____. March 15, 2026 instalment \$ _____.
- Attach copy of 2024 Notice of Assessment and any Reassessments or Notices received in 2025.
- Amount of any distributions or loans from foreign trusts received in 2025.
- Receipts for property taxes or rent paid in 2025 and name of municipality or landlord, respectively – obtain receipts.