

# 2025 INCOME TAX CHECKLIST

**Client Name:** \_\_\_\_\_

## Were there any changes to your:

- Marital status
- Number of dependents (children or family members)
- Home address

- Adoption expenses
- Moving expenses
- Rent and property tax receipts
- Renovation expenses for HATC or multigenerational home reno tax credit
- Student loan interest

## Tax Slips

- T4 slips (Employment Income)
- T4RSP, T4RIF slips
- Employment insurance benefits (T4E)
- Interest, dividends, mutual funds (T3, T5, T5008)
- Tuition / education receipts (T2202A)
- Old Age Security and CPP benefits (T4A-OAS, T4AP)
- Other pensions and annuities (T4A)
- Social assistance payments (T5007)
- RRSP contribution slips (Don't forget slips for the first 60 days of 2025)
- Contributions to your FHSA

## Other documentation

- Canada revenue agency correspondence
- Sale or deemed sale of stocks, bonds or real estate
- Sale or deemed disposition of your personal residence (must be reported)
- Rental income and expense receipts
- Business, farm or fishing income/expenses
- Automobile / Travel logbook
- Disability Tax Credit Certificate
- Declaration of Conditions of Employment (T2200)
- Transit passes (Ontario Seniors)

## Receipts

- Record of support payments (paid/received) for a child, spouse or common-law partner
- Legal expenses related to support payments (under certain circumst.)
- Professional or union dues
- Tool expenses (Tradespersons & apprentice mechanics)
- Medical expenses (summary from pharmacy if available)
- Charitable donations
- Political contributions
- Childcare expenses

## Other reporting requirements

- Foreign Asset Reporting – Did you own foreign property(s) with a total cost of more than \$100,000 Canadian at any time in the year?



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