Davis Martindale

2025 T1 Canadian Personal Income Tax Checklist

Identification and Contact Information (Taxpayer 1)		
Full Name	SIN	Phone
Birthdate MM/DD/YY	Citizenship	Email
Spouse Information (Taxpayer 2)		
Full Name	SIN	Phone
Birthdate MM/DD/YY	Citizenship	Email
Dependent(s)		
Full Name	SIN	Email
Birthdate MM/DD/YY	Citizenship	Custody
Full Name	SIN	Email
Birthdate MM/DD/YY	Citizenship	Custody
If Any Changes		
Current Address		
Marital Status (as of Dec. 31/25)	Date of Change in Marital Status	
Investment Advisor		
Name	Email	Phone

Please review the list of income and deductions/credits below and check off those items that apply to you and your spouse.

Taxpayer 1	Taxpayer 2	Income	Taxpayer 1	Taxpayer 2	Income
☐	☐	First Home Savings Account - FHSA (T4FHSA)	☐	☐	Rental Income and Expenses (Broken out by short/long term rentals)
☐	☐	Employment Income (T4 or T4A Slips)	☐	☐	Capital Gains (Please indicate the cost and proceeds of any asset disposals)
☐	☐	Pension Income (T4A, T4OAS, T4AP, T4RIF, T4RSP, T4PS Slips)			
☐	☐	Employment Insurance Benefits (T4E Slips)	☐	☐	Self-Employment Income and Expenses
☐	☐	Investment Income – Interest Dividends (T5 Slips)	☐	☐	Retirement Income (RRSP, RRIF, Annuity)
☐	☐	Estate/Trust/Mutual Fund Income (T3 Slips)	☐	☐	Other Income, Support Received, Death Benefits, etc
☐	☐	Partnership Income (T5013)			

Taxpayer 1	Taxpayer 2	Deductions and Credits	Taxpayer 1	Taxpayer 2	Deductions and Credits
☐	☐	First Home Savings Account (FHSA) Contributions	☐	☐	Amount of Property Tax/Rent Paid in Year (include Landlord's Name and Address of Property)
☐	☐	RRSP Contributions			
☐	☐	Tuition Receipts (T2202 Form)	☐	☐	Charitable Donations
☐	☐	Union, Professional Dues Receipts	☐	☐	Political Contributions
☐	☐	Child Care Expenses (SIN, Name and Address of Caregiver)	☐	☐	Student Loan Interest Statement
☐	☐	Moving Expenses	☐	☐	Eligible Support Payments
☐	☐	Medical Expenses (2025 Summary from Pharmacy)	☐	☐	Other Deductions (Carrying Charges, Interest)
☐	☐	T2200/TL2 Forms (Employment Expenses - Include Statement of Exp.)	☐	☐	Renovations for Seniors/Multigenerational
☐	☐	T2201 Slips (Disability Deductions, Self/Dependents)	☐	☐	Worked in Construction
☐	☐	Home Office Expenses (Complete Checklist)	☐	☐	Digital News Subscription Costs

Taxpayer 1	Taxpayer 2	Other	Taxpayer 1	Taxpayer 2	Other
☐	☐	Copy of 2024 Notice of (Re)Assessment	☐	☐	Do you authorize CRA to provide info. about you to Elections Canada? (Check for Yes)
☐	☐	Income Tax Installments, Final Statement Indicating 2025 Total			
☐	☐	Details of Canada Savings Bonds Purchases/Cashed in and on Hand Purchases/Cashed in and on Hand	☐	☐	List of Foreign Property Owned if Cost > $100,000 (T1135)
			☐	☐	Are you a U.S. Green Card Holder? (Check for Yes)
☐	☐	Direct Deposit Refund (Enclose 'Void'Cheque for Account Info)	☐	☐	Did you spend more than 120 days in the U.S. during 2025? (Check for Yes)
☐	☐	Details of any Residence Sold During the Year			
☐	☐	Have you received any private corporationdividends not exempt from TOSI?	☐	☐	Do you want govn't to contact you re: organ donation?