

Your 2025 Federal Personal Income Tax Return

Please review and complete the list and return it to our office with the applicable documents. Alternatively, you can contact us at info@gbco.ca to send your information electronically or request a secure ShareFile portal link.

In order to more efficiently deliver your tax return to you we will, where practical, email it to you electronically (password protected) when it is completed. If you prefer to receive a paper copy please indicate below.

Yes, please send me a paper copy. There will be a \$25 charge added to the invoice for a paper copy.

A fillable PDF copy of this checklist is available on our website at www.gbco.ca, along with other schedules and excel templates.

ALL RECORDS MUST BE RECEIVED BY *APRIL 13, 2026*
TO ENSURE WE WILL BE ABLE TO MEET THE FILING DEADLINE.

Please complete this section with your personal information.

	Taxpayer	Spouse
Name	_____	_____
Address	_____	_____
	_____	_____
Birthdate	_____	_____
S.I.N.	_____	_____
Marital Status	_____	_____
Phone number	_____	_____
Citizenship	_____	_____
Current email address	_____	_____

If we do not prepare the return for your spouse please provide their net income: _____

Province of Residence on December 31, 2025 _____

Please enclose a copy of your 2024 Tax Return.

Please enter below the required information regarding your **dependents**. Please note that same-sex couples who live together are considered to be living common-law.

Name	Relationship	Date of Birth	SIN	Income

PLEASE ANSWER ALL THE FOLLOWING QUESTIONS

YES NO

Do you consent to provide your address and information to Elections Canada?

Do you consent to provide your address and information to BC Transplant?

Were you a first-time homebuyer in 2025?

Did you sell any real estate property in 2025? If yes **please contact us** for more details.

Do you prefer to receive CRA correspondence via online mail in My CRA? If you check yes, paper notices will no longer be mailed. If you have already changed this preference directly with the CRA, please leave this question blank.

Did you register for GST for your business or rental property this year? Contact us if yes.

Do you have a financial advisor for investment purposes? Please provide us with their contact information.

Did you open up your first, new, FHSA in 2025?

Are any of your dependents (including parents who live with you) disabled? An eligible T2201 Disability Tax Credit form should be on file with CRA. If you believe a dependent may qualify, please contact us.

FOREIGN PROPERTY REPORTING

YES NO

Did you own **foreign revenue producing property** at any time in 2025 with a total cost of more than \$100,000 CAD? If you are unsure, **please contact us**.

ADDITIONAL NOTES AND QUESTIONS

PERSONAL TAX PREPARATION CHECKLIST: CHECK ALL THAT APPLY TO YOU

Personal income

T4 – employment income

T4A – employment, pension/superannuation other

T4A (P) – Canada Pension Plan

T4A (O) – Old Age Security

T4FHSA – First Home Savings Account

T4RSP – RRSP income

T4RIF – RRIF income

T4E – Employment insurance benefits

T5007 – WCB

RRSP Home Buyers Plan details

RRSP Lifelong Learning Plan details

T4RCA – retirement related income

Sale of principal residence – please contact us

Other – specify:

Other Income

Scholarships, fellowships, bursaries

Spousal support received

Child support received

Investment income

T3 slips

T5 slips

T5008 / Capital gains & loss reports

T5013 slips

Interest received on CRA tax refunds

Details on foreign income

Sale of any other real estate property – please contact us

Business & Rental income

- Self-employment earnings (summarized).
- Rental income (Airbnb, long-term residential, other) (summarized).
- Farming / fishing earning (summarized)
- Other – specify:

Deductions and Credits

- | | |
|---|--|
| RRSP contribution slips for Mar – Dec 2025 | Child care expenses |
| RRSP contribution slips for the first 60 days of 2026 | Child support paid |
| FHSA contribution slips for calendar year 2025 | Moving expenses paid. Please contact us for details. |
| Spousal support paid | Investment management fees paid |
| Summary of adoption expenses incurred | Interest paid on student loans |
| Interest and carrying charges on investments | Deductible legal fees paid |
| Union / professional dues paid | Eligible tuition fees paid (form T2202A or TL11) |
| Summary of employment expenses (T2200 required) | Eligible receipts for donations |
| Summary of eligible medical expenses not reimbursed | Accounting fees paid to <i>previous</i> accountant |
| Other – specify: | |

Please note due to new FINTRAC (Financial Transactions and Reports Analysis Centre of Canada) and AML (Anti Money Laundering) regulations, we are no longer able to accept cheques directed to the Canada Revenue Agency on your behalf. Updated instructions on how to make a payment will be included in the cover letter of your tax return.

SUMMARY

Once you have collected the applicable information please forward to our office. We will prepare your return, based on the information you provide to us, and electronically file it with Canada Revenue Agency. It is your responsibility to ensure the accuracy and completeness of this information. We do not audit, review or otherwise verify the accuracy of this information. If you have any questions regarding your return please feel free to contact us.

Yours truly,



Chartered Professional Accountants

I confirm the accuracy and completeness of the information provided and agree to the terms outlined above.

_____ Signature

_____ Please print name

