

Wealth Insights WM360°



Achieving Financial Success™

Finance for Life. Wealth for Living.™



680 Rexdale Blvd., Suite 205
Toronto, ON M9W 0B5

616 Concession Street East
Hamilton, ON L8V 1B5

1792 Liverpool Road,
Loblaws Mall
Pickering, ON L1V 1V9

308-1670 North Service Road
Oakville, ON L6H 7G3

Personal Tax Organizer 2025

TollFree: 1-877-422-6346

Email: taxservices@canfin.com

Deadlines 2026:

RRSP Contribution - March 2

Tax Filing - General - April 30

Tax Filing Business - June 15

INCOME – DID YOU RECEIVE:	YES	NO	IF YES – PLEASE SUBMIT:
Employment income			T4 or T4PS slips and details of other benefits or employment income not on T4 slips (eg. TIPS)
Self-employed commission income/Fees for other services			T4A, and provide a detailed list of additional income and expenses
Scholarships/Grants/Bursaries/RESP payments			T4A
Old Age Security (OAS) benefits			T4A (OAS)
Canada Pension Plan benefits			T4A (P)
Payments from an estate or trust			T3 slips or related information
Social Assistance payments/ Workers compensation benefits			T5007
Pension Income *SPLIT pension income with spouse? <input type="checkbox"/> Yes <input type="checkbox"/> No			T4RIF/T4A
Employment insurance benefits			T4E
Canadian Dividends or Interest			T5
Income from RRSP Homebuyer's plan or Lifelong learning plan (current year or in the year prior)			T4RSP slip; Date of Eligible Withdrawal
Investment in tax shelters/limited partnerships			Details, T5013
Income from outside Canada (Foreign Pensions/investments)			Slips, or details/statement where no slips available
Rental Income			Provide a detailed list of income and expenses
Self-Employment Income (Business/Professional/Farming/Fishing) ----- *Are you registered for GST/HST? <input type="checkbox"/> Yes <input type="checkbox"/> No			Provide a detailed list of income and expenses ----- ----- -if you filed your GST/HST return separately, please provide a copy of the return. If we are filing it for you, please identify the HST portion for each Income and Expense.
Proceeds from the sale of any stocks, bonds, real estate, options or redemption of any mutual fund units			T5008; "Securities Transaction Details" including transaction commissions paid; your "Annual trading summary"
Any Other Income not listed above			Statements, details
Did you sell your Principal Residence in 2025?			Details for S3 Principal residence (Year of acquisition, proceeds of disposition, co-owners & % of ownership)
Have you sold a real estate property that is not your principal residence (including rental property) which you owned for more than 365 consecutive days ?			Details for S3 Capital Gains Schedule (Year of acquisition; Details of disposition- Proceeds, ACB, outlays & expenses/Statement of Adjustments)
Have you disposed of a housing unit (including a rental property) or rights to acquire a housing unit, that you owned or held for less than 365 consecutive days before the disposition? (visit CRA's website for further details and exclusions)			Details for T2125 Statement of Business or Professional Activities (Year of acquisition; Details of disposition- Proceeds, ACB, outlays & expenses/Statement of Adjustments)
TAX DEDUCTIONS – FOR THIS TAX YEAR	YES	NO	IF YES – PLEASE SUBMIT:
Contribute to, or roll-over eligible income to an RRSP			Tax Receipts
Pay interest on your student loan in current/prior year			Loan Interest Statements
Pay union or professional dues (e.g. Nurse, Teacher, Engineers, etc.)			Tax receipts
Invest in a labour sponsored venture fund			Federal and provincial tax receipts – T5006

Incur moving expenses (Applicable only if you moved at least 40 kms. closer to your new place of work than the prior location) see CRA for further eligibility details.			DETAILS Purpose; Start date of new Employment/business/Studies; Old & new location addresses; Expense details and receipts
Pay child care expenses so you could work or attend school (including summer camps)			Details and receipts of payments made to caregivers, day care centres; camps or sport schools where the primary goal of the camp is to care for children
Incur expenses to earn investment income (i.e. investment counsel fees, interest)			Details and Receipts or Statements
Make charitable or political donations			Tax receipts
Did your spouse or dependent child become disabled during the year			Form T2201 to be completed by your physician
Pay for medical or dental expenses for which you were not reimbursed for; or paid premiums for extended medical or dental coverage			Receipts; Annual claim summary from Insurance company; - If you have a lot of receipts for prescription medication, please ask your pharmacy for an Annual summary/Statement
If you or your spouse is 70 years of age or older, did you pay for eligible expenses to support aging at home?			Detailed Receipts of eligible expenses. Ex. Walking aids, bathroom aids, hospital beds, glasses, diapers, etc.
If you, or a family member is eligible for Disability tax credit, or is 65 years and older, did you pay for expenses to renovate your home to make it safer and more accessible?			Detailed receipts of eligible expenses
Incur qualifying renovation expenses to create a secondary unit in your home to reside with a qualifying relative? ***See "Multigenerational Home renovation Tax credit" at CRA's website for further details			Renovation expenses (including Receipt/contract date, Vendor/contractor, GST/HST and description)
Pay property taxes or rent during the year (except for rents paid to a government-subsidized housing)			Property tax receipt – amount on "FINAL 2025 TAXES"; RENT receipts, or total amount of rent paid in the year, and the name of the landlord or property management.
Incur any meals/board/lodging costs as a transport employee			Form TL2 to be completed by your employer
Incur any expenses to maintain an office in your home as required by your employer			Form T2200 completed by your employer; Provide a detailed list of expenses
Incur any AUTO expenses or other expenses as an employee			Form T2200 completed by your employer; Provide a detailed list of expenses
Buy any tradesperson or mechanics' tools			T2200 and letter of approved tools from employer; Receipts
If you are an Eligible Educator- did you buy eligible teaching supplies? Refundable tax credit up to \$1000.00			Receipts
Did you, your spouse, or any of your dependent children attend university or college			Form T2202A/T2202/TL11B/TL11C -if student is transferring tuition credit to a spouse/parent/grandparent, the student must complete pg.2
Support any relative who is disabled? Or did you provide care for an infirm parent, grandparent or for a dependent adult relative 18 years of age or older?			Details, including the income of the person receiving the care
Incur any exploration and development expenses			T101/102 slips
Adopt a child under 18 years old during the year			Details of adoption fees, other expenses
Paid any foreign taxes			Slips, paystubs, or a copy of the tax return filed in the foreign country, showing the foreign tax paid or withheld
Purchase your "first home" or purchased a home for a disabled person			Details
Open an FHSA in 2025?			Details
Make a non-qualifying withdrawal from your FHSA in 2025?			T4FHSA
Volunteer as a firefighter or search and rescue, for at least 200 hours in year			Letter from the fire chief indicating at least 200 hours achieved
OTHER	YES	NO	IF YES – PLEASE SUBMIT:
Did you pay any federal tax installments for the taxation year other than amounts deducted from pay cheques			Amount: \$ _____ Provide receipts and latest statement account
If you have a spouse or common law partner and his/her taxes, are they going to be filed independently?			Provide Spouse/common law partner's net income (line 236 of their tax return) to both preparers: \$ _____

Disclaimer: The information contained in this checklist is provided for general organizational and informational purposes only and does not constitute formal tax, legal, or accounting advice. Canadian tax laws are complex, subject to change, and dependent on individual circumstances. You are responsible for consulting a qualified Canadian tax professional (such as a CPA) to ensure compliance with your specific tax obligations and to determine how the information applies to your situation. You remain solely responsible for any tax-related consequences, penalties, or outcomes. We are not liable for errors based on incorrect or incomplete information.