

## 2025 – PERSONAL INCOME TAX CHECKLIST

Please Review the Items Below To Ensure You Have All Relevant Material

**ALL INCOME SLIPS MUST BE REPORTED FOR THE YEAR  
AS CRA PENALIZES TAXPAYERS FOR MISSING SLIPS AND UNDECLARED INCOME**

**IT IS YOUR RESPONSIBILITY TO ENSURE THAT WE RECEIVE ALL INCOME SLIPS  
THE CRA REQUIRES ALL TAX RETURNS TO BE FILED ELECTRONICALLY (E-FILED)**

Please upload the completed form and any attachments to our secure portal  
<see instructions in email> alternatively, you may email the following information to  
[tax@mcgovernhurley.com](mailto:tax@mcgovernhurley.com).

1. Your name:

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2. Date of Birth:

3. Your preferred Confidential Email Address:

(For general correspondence if you choose not to use our secure upload portal)

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4a. Are you a U.S. Citizen, Green Card Holder, or were you, or your parents, born in the United States?

Yes

No

If so, please provide us with your U.S. Social Security Number, as you may have U.S Tax Return filing obligations. If your answer to 4a. is "No", please refer to 4b.

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4b. If your answer to 4a. was "No" and you are not a U.S. person, did you spend more than 31 days in the United States during 2025?

Yes

No

If "Yes", please provide further details including the number of days spent in the U.S during 2023, 2024 and 2025. You can confirm the number of days spent online using the I-94 travel record from the U.S government website – you will need to provide your passport information.

[\(I-94/I-95 Website - Official Site for Travelers Visiting the United States\)](#)

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**5. Did your marital status change? If so, please provide the date and your new marital status.**

Yes  No  Date of Change:

**6. Did you sell your principal residence or move during 2025?**

Yes  No  Date of sale (closing date):

If so, please provide details of your new address:

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**7. Were any children born or adopted during the year?**

Yes  No

If so, please provide his/her name(s), date of birth, date of adoption (if applicable) and social insurance number (if available).

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**8. A summary of interest income earned on your longer-term investments, but not yet received.**

An annual accrual of interest income is required to be included on your tax return.

YES	N/A	
<input type="checkbox"/>	<input type="checkbox"/>	

**9. Please be sure to include ALL your slips, as CRA charges significant penalties on failure to report income on slips.**

T3		T4(RIF)		T5		T5003		TL11A, B, C, D
T4		T4(E)		T10		T5007		T2200 or T2200-S
T4A		T4PS		T101		T5008		T2202A
T4AP		T4RSP		T1163		T5013		RC62
T4A(OAS)		T4A-RCA		T1164		T5018		Any other slips
Foreign tax slips				Statements / information for any other income / trust distributions				

**10. The following receipts, if and where applicable:**

YES	N/A	
<input type="checkbox"/>	<input type="checkbox"/>	RRSP slips and repayments, including Home Buyers' Plan and Lifelong Learning Plan withdrawals and repayments.
<input type="checkbox"/>	<input type="checkbox"/>	T4FHSA slips reporting contributions to and withdrawals from Tax-Free First Home Savings Account (FHSA). If an FHSA has been opened, but not contributed to, please let us know.
<input type="checkbox"/>	<input type="checkbox"/>	Union and professional dues.
<input type="checkbox"/>	<input type="checkbox"/>	Tuition receipts – please provide a T2202A or TL11A issued by the college or university. For Canadian schools you must log in to the student account to download a copy of the T2202A.
<input type="checkbox"/>	<input type="checkbox"/>	Child care expenses – please provide the name, address and SIN if paid to an individual.
<input type="checkbox"/>	<input type="checkbox"/>	Medical expenses – please summarize, total and provide receipts. Provide payments made to a private health service premium plan. Contact drug store to request an annual summary of the prescription report. Download annual payment statement from your employer health plan.
<input type="checkbox"/>	<input type="checkbox"/>	Charitable donations – please summarize, total and provide receipts.
<input type="checkbox"/>	<input type="checkbox"/>	Student loan interest.
<input type="checkbox"/>	<input type="checkbox"/>	Public transit receipts – only provide if you have attained the age of 65 at the beginning of 2025. Do not provide receipts if you are under the age of 65 as the credit was eliminated.
<input type="checkbox"/>	<input type="checkbox"/>	Adoption related expenses of a child who is under 18 years of age – maximum claim for 2025 is \$19,580. Please summarize, total and provide receipts.
<input type="checkbox"/>	<input type="checkbox"/>	Alimony / spousal support paid or received – please provide copy of Agreement, SIN, and address of recipient.
<input type="checkbox"/>	<input type="checkbox"/>	Information and expenses on any other dependent family members, including parents or grandparents.
<input type="checkbox"/>	<input type="checkbox"/>	Moving expenses – please provide a description of your move (at least 40km closer to business, work or school) and related expenses incurred.
<input type="checkbox"/>	<input type="checkbox"/>	Home accessibility expenses – if you have a disability tax certificate or if you are over the age of 65, provide renovation or alteration expenses related to allowing you to gain access to or to be mobile or functional, or reduce the risk of harm within your home.

YES	N/A	
<input type="checkbox"/>	<input type="checkbox"/>	Legal fees incurred to obtain or enforce spousal/child support or employment related.
<input type="checkbox"/>	<input type="checkbox"/>	Political contributions, please provide receipts.
<input type="checkbox"/>	<input type="checkbox"/>	Tuition fees, examination fees and ancillary fees (e.g. admission fees, charges for certificate, diploma, or degree) paid to post-secondary level universities or occupational-skills institutions for training courses taken in 2025.

**11. A summary of your employment expenses and a T2200 form signed by your employer.**

(If expenses include employment travel and/or motor vehicle expenses, please keep detailed travel logs in your files, which may be required by CRA in case of an audit/review.)

YES	N/A	
<input type="checkbox"/>	<input type="checkbox"/>	Click Here <a href="#">T777</a> To use our fillable PDF form to summarize your info.

*\*The temporary flat rate method for calculation of home office expenses due to COVID-19 is no longer available.*

**12. Did you receive or exercise stock options during the year?**

Yes                  No

If "Yes", please provide further details.

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**13. A summary of your capital gains/losses for the year.**

(Please provide an annual summary from your investment broker. Also provide a summary of any property that was sold or transferred during the year including real estate or assignment sales).

YES	N/A	
<input type="checkbox"/>	<input type="checkbox"/>	

**14. A summary of your capital gains/losses resulting from cryptocurrency, non-fungible tokens or other similar assets for the year.**

(Please provide an annual summary from your wallet or any other applicable report. Note, exchanges from one cryptocurrency to another or payment for services or product using cryptocurrency or similar assets will result in a disposition of that particular asset.)

YES	N/A	
<input type="checkbox"/>	<input type="checkbox"/>	

**15. A summary of any investments, including financial statements where applicable.**

If your ownership of shares in a foreign corporation exceeds 1%, please provide actual percentage owned.

YES	N/A	Details of investment
<input type="checkbox"/>	<input type="checkbox"/>	

**16. A summary of investment costs and statements showing:**

YES	N/A	
<input type="checkbox"/>	<input type="checkbox"/>	Interest paid on investment loan(s)
<input type="checkbox"/>	<input type="checkbox"/>	Management fees paid to your broker
<input type="checkbox"/>	<input type="checkbox"/>	Accounting fees

(Note: Safety deposit box fees are no longer deductible.)

**17. Rental receipts - Please include the landlord's name, address and amount paid.**

YES	N/A	Landlord name	Address you rented at	Total rent paid for year
<input type="checkbox"/>	<input type="checkbox"/>			

**18. Property taxes paid – Please provide us with a copy of the 2025 final property tax bill.**

YES	N/A	Details
<input type="checkbox"/>	<input type="checkbox"/>	

**19. Total of income tax instalments made for the 2025 income tax year.**

YES	N/A	Details
<input type="checkbox"/>	<input type="checkbox"/>	

**20. T2201 Disability Tax Credit certificate from your doctor, if anyone in your family is disabled.**

If you have previously claimed the deduction, you do not require one unless the certificate expired in 2025 or will expire in 2026. Examples of disability support expenses you may claim include speech, sight, hearing, learning aids for impaired individuals and attendant care expenses.

YES	N/A	
<input type="checkbox"/>	<input type="checkbox"/>	Click Here <a href="#">T2201</a> To use a fillable PDF of the <b>T2201 Disability Tax Credit Application</b> Form.

21. If you are a first time homebuyer, please advise us, since there is a tax credit that may be available to you.

YES	N/A	Details on first time home purchased
<input type="checkbox"/>	<input type="checkbox"/>	

22. Did you own or hold foreign property at any time during the year with a total cost of more than \$100,000CAD?

If so, please provide a summary and/or obtain the T1135 information relating to the foreign property listed below from your broker. If your broker is unable to provide this, please send us copies of your monthly investment statements.

YES	N/A	
<input type="checkbox"/>	<input type="checkbox"/>	Click Here <a href="#">T1135</a> To use a fillable PDF of CRA's <i>T1135</i> Form.

23. The percentage of shares you own in foreign corporations.

*T1134 Information Return Relating to Controlled and Not-Controlled Foreign Affiliates* is required to be prepared and filed separately if you and a related group own 10% or more of the shares. There will be additional charges, if this form is required.

YES	N/A	Details of ownership
<input type="checkbox"/>	<input type="checkbox"/>	

24. Details of transfers or loans to, or distributions or indebtedness from, a non-resident trust.

*T1141 Information Return in Respect of Transfers or Loans to a Non-Resident Trust* and/or *T1142 Information Return in Respect of Distributions from and Indebtedness to a Non-Resident Trust* is/are prepared and filed separately. There will be additional charges if one or more of these forms is/are required.

YES	N/A	Details of Loans, Distributions or Indebtedness
<input type="checkbox"/>	<input type="checkbox"/>	

25. If you are self-employed or a partner in a partnership, please provide a summary of your income and expenses, or financial statements.

YES	N/A	
<input type="checkbox"/>	<input type="checkbox"/>	Click Here <a href="#">T2125</a> To use our fillable PDF form to summarize your info.

26. If you have a rental property, please provide a summary of income and expenses.

YES	N/A	
<input type="checkbox"/>	<input type="checkbox"/>	Click Here <input type="text" value="T776"/> To use our fillable PDF form to summarize your info.

*\*Income tax deductions for short-term rentals that are non-compliant with municipal or provincial legislation will be denied. Please see above link for further details.*

27. If you sold real estate property which was owned for less than 365 days, please provide a summary of the property's original cost, cost of capital expenditures, and proceeds of disposition.

YES	N/A	
<input type="checkbox"/>	<input type="checkbox"/>	

28. If you work in the trades, please provide invoices for tradesperson's tools expenses.

You will need a **T2200 Declaration of Conditions of employment** form, signed by your employer.  
\*The maximum employment deduction is \$1,000.

YES	N/A	
<input type="checkbox"/>	<input type="checkbox"/>	

29. Allowable business investment loss.

If you have loaned money or invested in a Canadian small business and the company has either ceased operations or gone bankrupt, you may be entitled to a deduction for your investment. Please contact us to discuss.

YES	N/A	Details of Business Investment Loss
<input type="checkbox"/>	<input type="checkbox"/>	

30. If you have done any renovations to your home to create a self-contained secondary unit to allow a qualifying relative senior or adult with a disability to live with you, please provide receipts.

YES	N/A	Details on Renovations
<input type="checkbox"/>	<input type="checkbox"/>	

31. If you emigrated from Canada in 2025, please provide the date of emigration.

YES	N/A	Date of Emigration
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

32. If you immigrated to Canada in 2025, please provide the date of immigration.

YES	N/A	Date of Immigration
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

33. Correspondence received from the Canada Revenue Agency during the year.

(Including any Notices of Assessment or Reassessment of prior years', which have been received during the year)

YES	N/A	Details of CRA Correspondence
<input type="checkbox"/>	<input type="checkbox"/>	

34. Any foreign tax returns filed. If yes, please provide copies including assessment from foreign tax authorities.

YES	N/A	Details on Foreign Tax Filings
<input type="checkbox"/>	<input type="checkbox"/>	

35. If you have earned income outside of Canada and/or received tax slips from a foreign tax authority, please provide us with details and/or copies of such slips.

YES	N/A	Details on Foreign Income
<input type="checkbox"/>	<input type="checkbox"/>	

36. Any additional information, comments, or changes from last year: