

# 2025 Personal Income Tax Preparation

## Checklist

Make sure you have all your t-slips and relevant information.

**Personal Income Tax filing deadline is April 30, 2026.**

Self-employed filing deadline June 15, 2026 & Payment deadline April 30, 2026



## REFERENCE INFORMATION

<b>2024 Income Tax Assessment</b>
Access to your Canada Revenue Agency " <b>My Account</b> "
<a href="http://Canada.ca/taxes">Canada.ca/taxes</a> – information from CRA including General Income Tax and Benefit Guide, other Guides, Forms
Choose your tax preparation software to <b>Netfile</b> or contact an <b>Income Tax Preparer</b> to complete your return

## INCOME SOURCES

<input type="checkbox"/> T4	Employment Income	<input type="checkbox"/> Capital Gain/Loss - securities & other capital property (not included on T5008)
<input type="checkbox"/> T4E	Employment Insurance Income	<input type="checkbox"/> Foreign Income
<input type="checkbox"/> T4A	Pension, Retirement, Annuity & Other Income (including CERB Benefits)	<input type="checkbox"/> Self Employed Income (& expense receipts)
<input type="checkbox"/> T4A(P)	Canada Pension Plan (CPP)	<input type="checkbox"/> Rental Income (& expense receipts)
<input type="checkbox"/> T4A(OAS)	Old Age Security (OAS)	<input type="checkbox"/> Spousal Support Income (from Divorce)
<input type="checkbox"/> T4RSP / T4 RIF	RRSP / RRIF Income	<input type="checkbox"/> Other Income
<input type="checkbox"/> T5 / T3 / T5008	Investment Income	<input type="checkbox"/> US Citizens Residing in Canada / Other Foreign Residents
<input type="checkbox"/> T5013 / T101	Partnership / Resources Income	<input type="checkbox"/> Report Sale of Primary Residence

## DEDUCTIONS & TAX PAID

<input type="checkbox"/> RRSP Contribution Receipts	<input type="checkbox"/> Digital News Subscription Tax Credit
<input type="checkbox"/> Union & Professional Dues	<input type="checkbox"/> Home Office Expense for Employee Credit
<input type="checkbox"/> Charitable Donations Receipts	<input type="checkbox"/> Employment Expenses - T2200 Declaration of Conditions of Employment (from Employer), Complete T777, Receipts
<input type="checkbox"/> Education & Tuition Receipts (T2202A)	<input type="checkbox"/> Eligible Educator School Tax Credit (Max \$1,000 in receipts, Employer Declaration)
<input type="checkbox"/> Interest Paid on Eligible Student Loans	<input type="checkbox"/> Moving Expenses (+40km for employment, business or education)
<input type="checkbox"/> Child Care Expenses	<input type="checkbox"/> First Time Homebuyers Tax Credit
<input type="checkbox"/> Spousal Support Paid	<input type="checkbox"/> Interest Paid on Investment Loan
<input type="checkbox"/> Medical Expense Receipts	<input type="checkbox"/> Political Contribution Receipts
<input type="checkbox"/> Disability Certificate	<input type="checkbox"/> Rent / Property Taxes Paid
<input type="checkbox"/> Canadian Caregiver Amount	<input type="checkbox"/> Foreign Tax Paid
<input type="checkbox"/> Home Accessibility Expenses (Max \$10,000 for qualifying Individuals)	<input type="checkbox"/> Installment Payments