

Personal Income Tax Checklist 2025 Taxation year

PERSONAL INFORMATION (If we prepared your 2024 return, please complete ONLY if there is a change)

Taxpayer Name: _____ Spouse Name: _____

SIN: _____ SIN: _____

Date of Birth: (DD/MM/YYYY) _____ Date of Birth: (DD/MM/YYYY) _____

Phone (home): _____

Phone (Other): _____

Emails(s): _____

Marital Status: Married Single Common-law Separated Divorced Widowed

If marital status changed during the year, provide date of change (DD-MM-YY) _____ nature of change _____

Did the marital status change made you move out from your Principal Residence (PR)? Yes No

DEPENDANTS (If we prepared your 2024 return, please complete ONLY if there is a change)

Name	Date of Birth (DD/MM/YYYY)	SIN	Relationship

RESIDENCE (If we prepared your 2024 return, please complete ONLY if there is a change)

Province or territory of residence on December 31, 2025 _____

FOREIGN REPORTING (PENALTIES APPLICABLE if not reported)

• Do you own/hold foreign Property / assets at any point of time in 2025 or before outside your RRSP (other than personal use assets such as cash, stocks, digital currency like Bitcoin, real estate) with a cost of: more than CDN \$250,000? Yes No

Or

• Between CDN \$100,000 and CDN \$250,000 Yes No

• Foreign affiliates (controlled or non-controlled) Yes No

Please provide details of ownership of foreign assets and transactions with foreign entities

• Did you inherit any property/money or any kind of asset which is worth \$100,000 at any point of time in 2025? Yes No

HOME/ PRINCIPAL RESIDENCE (Buy or Sell)

• Did you dispose of or sell your principal residence during the year? If Yes, Provide details of and/or documents for purchase and sale. Yes No

• Did you rent a significant portion of your principal residence? Yes No

• Have you moved out of your principal residence because a significant portion of the property was damaged by fire? Yes No

• Did you change your principal residence into a rental property? Yes No

• Did you buy a Principal Residence? Yes No

INCOME

• T4 slips - Employment income (including stock option benefits)? Yes No

• T4A - Commission and self-employment (including directors fees, scholarships, bursaries)? Yes No

• T4E - Employment insurance? Yes No

• T5007 - Social Assistance or Workers' Compensation Yes No

*We do e-filing for quicker refund, where applicable
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PLB TAX, Chartered Professional Accountant

| Unit 216, 6678 152 street, Surrey, BC V3S 7J2 | T. 604.581.1000 | F. 778.775.1109 | E. pradeep@plbtax.com |

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• Income not included on T4 (tips, gratuities, and occasional earnings etc.)? \$ _____		
• T4A - Pension, retirement, and annuity income?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• T4A(OAS) - Old age security?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• T4RSP - Registered retirement savings plan income (including withdrawals)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• T4AP - Canada pension?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• T4A(RCA) - Retirement compensation arrangements?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• T4RIF - Registered retirement income fund income?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Foreign pension income? Attach details of amounts received?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Other Foreign Income	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• T3 - Income from trust allocations?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• T5 - Investment Income (dividends, interest, including interest earned but not yet received, for example, Canada Savings Bonds)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• T4PS - Income from profit sharing plans?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• T5013/T5013A - Partnership income?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• T5008 - Income from Securities transactions?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Other investment income, for example labour sponsored funds? Please provide details	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Shares acquired and/or disposed of through exercise of stock options?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Did you dispose of property during the year (publicly traded shares, bonds, real estate, etc.)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Any Support payments received? (Spousal support and/or child support)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• RRSP Withdrawal: Income or Home buyers plan or Lifelong learning?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• T4FHSP Contributions and/or withdrawal?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

OTHER INCOME – Details of any of the below income where no T slips may have been received:

• Other employment income (including stock options and Election Form T1212)	
• Rental Income	
• Alimony, separation allowances or child maintenance	
• Pension income from foreign source and the type of pension.	

DEDUCTIONS

• Disability support deduction?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Childcare expenses? Please provide receipts for each child	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Professional or Union dues paid? (Not included on T4) \$ _____		
• Any Support payments made? (Spousal support and/or child support)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Moving expenses? Please provide details with all receipt	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Interest cost on funds borrowed to earn investment \$ _____		
• Investment management fees \$ _____		
• Accounting/ Legal fees \$ _____		
	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• CERB/CRB Repayments – support for any CERB/CRB amounts repaid during 202	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Northern residents' deduction in a prescribed area	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Clergy resident deductions.	<input type="checkbox"/> Yes	<input type="checkbox"/> No

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TAX CREDITS

• Home Accessibility Tax Credit (HATC) (65+ and/or disabled) (B.C. up to \$1,000 back) & (Up to \$20,000 federal credit)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Multigenerational home renovation tax credit (MHRTC) (Up to \$7,500 back)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Did you incur any adoption related expenses?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Are you eligible for disability tax credit?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Charitable Donations? Attach receipt. - Donation of cultural property - Donation of ecologically sensitive land - Gifts to foreign Charitable Foundations	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Political Donations? Attach receipt.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Tuition fees for yourself? (Form T2202 TL11A, B, C and D where applicable)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Tuition fees for your dependent(s)? (Form T2202 signed by student)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Interest on student loans? Attach receipt	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Trade or professional examination or other professional dues? Attach receipt	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Did you complete a minimum of 200 hours of volunteer fire-fighting services in the year, which includes responding to calls, being on call, attending meetings and training related to prevention and suppression of fire?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Do you or dependents have prolonged mental & physical impairment or life-sustaining therapy) (Vision, memory, speech, Type 1 Diabetes Kidney Disease etc.)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Employment expenses (Form T2200 signed by employer), including tools?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Medical expenses (including travel insurance, Gluten-free products, medical marihuana and cannabis products for medical purposes etc.)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Canada Caregiver Credit	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Caregiver Training courses	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• First-time home buyer tax credit- \$10,000	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Eligible educator school supply tax credit? Claim up to \$1,000 for eligible teaching supplies	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Canada Training Credit? (Must have eligible tuition fees)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Air quality improvement tax credit Upgrade of mechanical heating, ventilation, and air conditioning (HVAC) systems	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Labour mobility deduction	<input type="checkbox"/> Yes	<input type="checkbox"/> No

OTHER CREDITS

• Pension Adjustment Reversals (T10 slip)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Film and Video production eligible for tax credit?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Flow-through share expenses	<input type="checkbox"/> Yes	<input type="checkbox"/> No

SUBCONTRACTOR/ PROPRIETORSHIP/ SELF – EMPLOYED

Please fill the income and expense checklist (Refer to the website for one)

• Financial statements or summary details for business/rental investments attached?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Details of income and expense items attached?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Details (including dates) of acquisition and disposals of fixed assets attached?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Do you use your vehicle for business? Provide expenses; both business and total kilometers	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Do you use a portion of your home for business?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Provide expenses; both workspace and total square footage of home and space used for business	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Do you have a payroll account?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Do you have a PST account?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
• Have you registered to be eligible for Employment Insurance special benefits?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

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2025 Taxation year

RENTAL PROPERTIES

Please fill the Rental income and expense checklist (Refer to the website for one)

- Do you have a GST account? Yes No
- If first year of rental, please provide details of the property.
- If you are renting the property on short term basis like Air BNB, VRBO then we should talk

RRSP CONTRIBUTIONS

- Did you make any RRSP contributions? Attach receipts (including those in the First 60 days of 2026) Yes No
- Did you make any FHSA contributions? Attach receipts Yes No

PRIOR YEAR TAX RETURN INFORMATION/CORRESPONDENCE

- Notice of (RE)Assessment for 2024 year including RRSP contribution limit? Yes No
- Notice of (RE)Assessment(s) for any other year if not already provided to us? Yes No
- **2025 Income tax instalments paid for the year?** Yes No
- Direct Deposit - is your information current? If changed, provide a VOID cheque Yes No

QUESTIONS (If you don't answer the following, we will assume it as "No")

- Do you agree to CRA providing your name, address, and date of birth to election Canada? Yes No
- Are you a Canadian Citizen? Yes No
- If no, are you a permanent resident? Yes No

QUESTIONS (If you don't answer the following, we will assume it as "No")

- Do you authorize the CRA to share your full name, email address and postal code to BC Transplant for the purpose of being contacted by email about organ and tissue donation? Yes No

PERSONAL PREFERENCES

- Format desired for the final copy of your personal income tax return(s) Paper Email
(Unless otherwise specified, we will send it to you via email. A paper copy is available for an additional charge.)
- If paper copy requested, indicate if you would like spouses return and family members packaged separately Separately Together
- Do you wish to register you email with Canada Revenue Agency ("CRA")? Yes No
(By providing your email, you understand that you are registering for online mail and accept the terms and conditions that are set out by CRA)

If yes, please provide the email address _____
✓ *By giving an email address, I am registering to receive email notifications from the CRA and agreeing to the terms of use with CRA.*

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IMPORTANT ITEMS !!!

- ✚ **Type 1 Diabetes** – Individuals with type 1 diabetes will be effectively deemed eligible for the disability tax credit. While this change was legislated in 2022, it is retroactive to 2021 and subsequent years.
- ✚ Certain costs reimbursed to **surrogate mothers** and for fertility, are eligible medical expenses.
- ✚ **Canada Dental Benefit** – The Canada dental benefit provides an up-front, tax-free payment to cover dental expenses for children under the age of 12 without dental coverage. The benefit is only available to families whose adjusted family net income is under \$90,000. Applications for this benefit can be made online on CRA's My Account
- ✚ **Home Buyers' Plan (HBP) withdrawals** – The HBP withdrawal limit has increased from \$35,000 to \$60,000 for withdrawals made after April 16, 2024.
- ✚ **Alternative minimum tax (AMT)** - AMT changes for 2024+ include a higher minimum tax rate, increased exemption threshold, revised adjusted taxable income calculation, special foreign tax credit changes, and limits on most non-refundable tax credits.
- ✚ **Short-term rentals** - Effective January 1, 2024, expenses for **non-compliant** short-term rentals, including interest, are no longer deductible.
- ✚ **B.C. renter's tax credit** – We need the rental address, amount paid and number of months you were renting.
- ✚ **Cryptocurrency and NFT** – Income from Cryptocurrencies of all kinds and NFTs are taxable in Canada.

FILING & PAYMENT DUE DATES FOR 2024 TAXES

April 30, 2026 (Thursday)	Deadline to file your taxes.
June 15, 2026 (Monday)	Deadline to file your taxes if you or your spouse or common-law partner are self-employed.
April 30, 2026	Deadline to pay your taxes., to avoid charges
March 31, 2026 (Tuesday)	GST if you have commercial property and GST for partnership
June 15, 2025	Deadline to file annual GST return.
April 30, 2026	Deadline to pay your GST.

Our office address is:

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