

**NEW CLIENT INFORMATION
for 2025 Personal Income Tax Returns**



** New Clients please provide a copy of previous year's Notice of Assessment and T1 General package*

BASIC PERSONAL INFORMATION				
	CLIENT		PARTNER	
Full Name				
Social Insurance Number			Disability	Disability
Date of Birth				
Home Address				
Current Marital Status				
Change in Marital Status in 2025?	YES	NO	YES	NO
Main Phone Number				
Additional Phone Number				
E-mail Address <i>(for portal purposes)</i>				
Please indicate how you would like to receive your personal tax return:	By Secure Portal to above Email In paper format		By Secure Portal to above Email In paper format	
Would like to use electronic DocuSign for signature purposes?	YES	NO	YES	NO
INFORMATION ON DEPENDENTS				
Name of Dependent and Relationship	Date of Birth	SIN	Net Income	Disability
				Yes
Do you have investment assets requiring a T1135 to be prepared?	YES	NO	YES	NO
Did you sell your home in 2025?	YES	NO	YES	NO
INFORMATION OF SALE OF PRINCIPAL RESIDENCE *				
<i>* If you have a second property that that would also qualify as a principal residence please inform us.</i>				
Address				
Name of owners if other than Client/Partner				
Year of acquisition				
Total Selling price				

ADDITIONAL INFORMATION			
	Client	Partner	
Are you a Canadian Citizen?	Yes No	Yes No	Yes No
<p><i>If you or your partner are a citizen of a country other than Canada, please discuss this with your primary contact at Graham Scott Enns as there may be additional information required.</i></p> <p><i>This includes US citizens. Please contact your representative.</i></p>			
May we provide information to Elections Canada on your behalf?	Yes No	Yes No	Yes No
May we provide CRA authorization to provide your name and email address to Ontario Health so that they may send you information about organ and tissue donation? <i>This is not consenting to organ and tissue donation.</i>	Yes No	Yes No	Yes No
Did you own Foreign Property with a cost > \$100,000 during 2025?	Yes No	Yes No	Yes No
Are you Self-Employed? <i>If yes, please be sure to supply us with your income & expenses as well as GST/HST information filed or to be filed</i>	Yes No	Yes No	Yes No
Did you purchase a home for the first time during 2025?	Yes No	Yes No	Yes No
Did you make any RRSP withdrawals during 2025 under the Home Buyer's Plan?	Yes No	Yes No	Yes No
Did you make any RRSP withdrawals during 2025 under the Lifelong Learning Plan?	Yes No	Yes No	Yes No
If an individual is deceased, please enter date of death and complete the "Final Return and Estate Checklist"	Date:	Date:	

2025 PERSONAL INCOME TAX CHECKLIST

CRA ASSESSMENTS

Previous year(s) Notice of Assessment

Tax instalments for Current Year

DEDUCTIONS

RRSP Contribution(s)*

Interest and Carrying Charges

Union and Professional Dues

Investment Counsel/Accounting Fees

Child Care Expenses*

Moving Expenses*

Child Care/Support payment Information

T2200 – Employment Expenses (Include List)

PERSONAL INCOME

T4 – Employment Income

T4E – Employment Insurance

Other Employment Income

T4PS – Profit Sharing Plan

Self-Employment Income and Expenses (CPP/EI)

T4RSP – RRSP Income

Rental Income and Expenses

T4RIF – RRIF Income

T4A (OAS) – Old Age Security

T5007 – Social Benefits Payments

T4A (P) – Canada Pension Plan

RC62 – Universal Child Care Benefit

T4A – Pensions and Other

Foreign Pensions

TAX CREDITS

Adoption Expenses

Foreign Employment Income

Public Transit Pass

T2202(A) – Tuition/Education Credit

Charitable Donations*

T2201 – Disability Tax Credit

Medical Receipts (less insurance reimbursements)*

Caregiver/Disability Amount

Private Travel/Medical Insurance Plan premiums paid

Student Loan Interest

First Time Home Buyer's Credit

INVESTMENT INCOME

T3 – Trust/Mutual Fund Income

Annual Statements (Mutual Funds/Securities)

T5 – Interest and Dividend Income

Trading Summaries (Securities)

T5008 – Securities

Capital Gain/Loss Summaries

T5013 – Partnership Income

Foreign Interest/Dividend Income

OTHER

Rent or Property Tax paid (low income & Seniors)

Tradesperson's Tool Expense

****detailed information and/or official receipts required***