



2025 T1 Personal Tax Information Request

If you are a **new client**, please complete **Page 1**. For **returning clients**, kindly inform me of any changes to the information on **Page 1** from the past year.

Personal Information:

	Name	Date of Birth	SIN	Residency Status	Email
Taxpayer					
Spouse					
Dependent					
Dependent					
Dependent					

Address: _____ **Home phone:** _____

Marital Status: Married C/Law Widowed Single Divorced Separated

Status & Residency:

New or Departing: I entered Canada or moved out of Canada in 2025. Date: _____

Date of Marital Status Change: _____

Spouse's Net Income if we are preparing your spouse's tax return separately: _____

Elections Canada: "Are you a Canadian citizen? Yes No. If yes, may we share your name, address, and date of birth with Elections Canada to keep your voter registration current? Yes No

Electronic NOA: Would you like to receive an electronic Notice of Assessment instead of a paper copy? (Only available for those registered with **CRA My Account**. Please note that if you select "yes," a paper copy will not be issued.) Yes No

Direct deposit: Would you like your tax refund to be deposited directly into your bank account? If so, please provide your void cheque details. Yes No

Life events: Have there been any other significant life events in the past year or current year, such as the impairment of a loved one, retirement, purchase a new home etc. There can be tax planning opportunities.

T-Slips and Receipts:

General: CRA correspondences (past 3 years) | Details of any tax instalments made

Employment-related Income: T4 | T4A | T4E | T4PS | T2200

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#301 9452 51 Ave NW
Edmonton, Alberta, T6E 5A6

Surrey Office:
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Investments: T3 | T5 | T5008 | T5013 | NR4

Retirement: T4A(OAS) | T4RIF | T4A(P) | Foreign Pension Receipts

Business/Other: T4A | T1204 | T5018 NR4 | T4A-NR

Education/Social: T2202 | RC210 | T5007 | Student loan interest Tuition credit transferred from a spouse or child, please let them complete and sign the transfer section on T2202 or TL11A

RRSP and FHSA: First Home Savings Account (FHSA) contributions and withdrawals

RRSP contributions and withdrawals (T4RSP)

RRSP repayments for home buyers plan and lifelong learning plan

Tax credits and deductions:

Childcare and related expenses, e.g. daycare, day camps, boarding schools. If an individual provides the services, their SIN should be on the receipts

alimony, separation allowances, child maintenance (including divorce/separation agreement)

Charitable donations

Political donations

Medical receipts for your family

adoption-related expenses

Disability Tax credit certificate

Caregiver: Are you the caregiver for any infirm family members?

Receipts for multigenerational home renovation tax credit – certain expenditures may be eligible for a tax credit to assist with the cost of renovating an eligible dwelling to establish a secondary unit that enables a qualifying individual (a senior or an adult who is eligible for the disability tax credit) to live with a qualifying relation

Home accessibility tax credit – renovation or alteration to your home to enhance mobility

Have you lived in a prescribed northern or intermediate zone that qualifies for the northern residents' deductions?

Did you buy a home in 2025 for the first time?

Employment deduction:

Working from home: only if you have T2200 provided by your employer

The portion of the home (approx. square footage of workspace/total square footage)

Home internet access fees, rent, utilities and office supplies

Self-employee: property tax and mortgage interest

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- Moving expenses If you moved 40 kilometres closer to your new working site or school, you might be able to claim the transportation, meals, lodging and other related moving expenses.
 - Date of moving _____
 - Date of new employment started _____
 - Address of your old home, address of your new home, and information about your new employee
 - Detailed expenses: transportation and storage, travel, temporary living, cost of selling the old home, cost of buying the new home
- Eligible educator school supply tax credit: only for teachers or early childhood educator (up to \$1000)
- Labour mobility deduction: Available for employed tradespeople and apprentices in construction industry
- Tools acquired by tradespersons and eligible apprentices mechanics (up to \$1000)
- Professional and union dues

Specialized Income:

Details of income or receipts for which no T-slips have been received, such as:

- Other employment income, including tips, or gratuities, details on stock options or restricted stock units
- Do you have foreign employment income? Please provide gross income, tax paid and foreign tax returns
- Business income, income from the sharing economy (e.g. Airbnb, Uber) and internet-based provisions (e.g. Social media subscribers)
 - Details of revenue and expenses
 - Details of capital purchased for your business, such as vehicles and equipment.
 - Details of business expenses
 - GST information, if applicable
- (IMPORTANT!)** If you earned income from a short-term rental (Airbnb, VRBO etc.), was the rental operation compliant with all provincial and municipal licensing, permitting and registration requirements by December 31, 2025?
 - Yes, please provide details of revenue and expenses
 - No, deductions against gross rental revenue will not be allowed.
- Rental income
 - The property address and ownership
 - Summary of rental income and detailed summary of rental expenses
 - Capital property purchased in rental operations.
- Investment income (self-managed)



- Details of capital gain/losses realized
- Bitcoin or other cryptocurrency transactions
- Summary of carrying expenses: accounting fee, management fee, interest on borrowing, outlays
- Disposition of real property or any assignment sales Notes: Please provide information if you have a **change in the use** of your property (from a self-used residence to a rental or from your rental to a principal residence)
 - The property address and ownership
 - The date of disposition, the date of change of use and the date of acquisition
 - The adjusting cost base of the property
 - The proceed of the disposition and the related outlay expenses.
- Foreign income and foreign taxes paid:
 - The copy of any foreign tax returns filed
 - The details of income from foreign entities or foreign pension
- If applicable, do you wish to split pension income (other than CPP benefit, OAS) between you and your spouse? _____
- Have you gifted cash or income-earning properties to your spouse or family members? If yes, please describe: _____

Foreign Reporting

- Did you own foreign investment property at any time in the year with a total cost of more than \$100,000?
Please complete the T1135 checklist. If so, please fill the T1135 checklist in the following pages.
- Did you own an interest in a foreign affiliate at any time?
- Were you a beneficiary of a trust outside of Canada?
- Did you have any real property or timeshare in the US or other foreign countries?
- Did you have any interest in a partnership or trust in the US or other foreign countries?



T1135 Checklist

This form is to be filed along with your regular tax return. Please complete the T1135 on time to avoid heavy penalties and extended re-assessment periods.

You do not need to report your foreign property information on T1135 if:

1. It is a personal use property that is not generating income (e.g., a vacation home, jewelry, car, etc.);
2. It is used in an active business.
3. It has a cost value UNDER \$100,000 for the ENTIRE year.

No, neither I nor any other family member must report foreign property on T1135.

Sign: _____ Date: _____

Yes, I have the following foreign properties to be reported on T1135 (please use a separate checklist for each family member who holds foreign properties to be written on T1135).

To the best of my knowledge, I declare that the information provided underneath is accurate and complete. I will provide your office with any new information that subsequently becomes available.

Name: _____ Sign: _____ Date: _____

1. Funds held outside of Canada:

Name of bank or other entity holding the funds	Country	Maximum balance during the year	Funds held at the end of the year	Income in the year

2. Shares of non-resident corporations (other than foreign affiliates):

Name of corporation	Country	Maximum cost amount during the year	Cost amount at the end of the year	Income in the year	Gain (loss) on disposition

3. Indebtedness owed by non-resident:

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Description of indebtedness	Country	Maximum cost amount during the year	Cost amount at the end of the year	Income in the year	Gain (loss) on disposition

4. Interests in non-resident trusts:

Name of trust	Country	Maximum cost amount during the year	Cost amount at the end of the year	Income in the year	Capital received in the year	Gain (loss) on disposition

5. Real property outside of Canada (other than personal use and real estate used in an active business):

Description of property	Country	Maximum cost amount during the year	Cost amount at the end of the year	Income in the year	Gain (loss) on disposition

6. Other property outside of Canada (including investment life insurance policies):

Description of property	Country	Maximum cost amount during the year	Cost amount at the end of the year	Income in the year	Gain (loss) on disposition

7. Property held in an account with a Canadian registered securities dealer or a Canadian trust company:

Name of registered security dealer/trust company	Country	The maximum market value during the year	Market value at the end of the year	Income in the year	Gain (loss) on disposition