

Please Note:

Our cutoff date for guaranteed filing by the deadline is April 2nd, 2026

Name (enter the names of all taxpayers we will be filing for)	Phone
Address	Email

General Questions and Changes for 2025:

	YES	NO	Amount or Info		YES	NO	Amount or info
Turned 65 in 2025			n/a	Change of Marital status			Please inform Date of change:
Multigenerational home renovations			New Deduction	Foreign property or investments > \$100,000			
Opened First Home Savings Account			New Contribution:	Tuition costs			Need T2202
Bought first time house			Date Bought:	Factual resident, Immigrant or Emigrant**			**See below**
Rent or Property tax (circle one)				Donations			
Sold Principal Residence			Selling Price: Year of purchase:	Medical expenses			
Did you have a child born in 2025?			Name and DOB:	Do you pay or receive spousal or child support (circle one)			
Non-registered Investment counsel fees				Moving expenses			
Are you required to file an HST return for self-employment income?			To be filed by us – circle Yes or No	Do you have a rental property?			Short-term rental? Non-compliant with municipal laws?
Business income and expenses			Details enclosed	Employment expenses			T2200 required
Marital status (circle one)			Married / Common Law / Divorced / Separated / Widowed	Are you a new client?			

Note: A “factual resident” is someone who keeps significant residential ties to Canada (i.e., own a home in Canada, or have a spouse/children living in Canada) while living or travelling outside of Canada (this travel can include working temporarily outside of Canada, teaching or attending school in another country, vacationing or living outside of Canada for part of the year). Even when outside of Canada, a factual resident is still considered a resident of Canada.