

Your 2025 tax intake package

Start here - choosing your forms

Prepared for clients of Arsen Accounting Services. Start with form 01, then complete only the additional forms that apply to you. These are fillable questionnaires, not the tax returns filed with CRA.

Which forms should I complete?

01 - Main personal tax intake

Everyone. Pages 1-5 first; pages 6-8 only if relevant. Couples may share one main form.

02 - Employment expenses

Unreimbursed expenses incurred as an employee. One copy per employer.

03 - Rental income and expenses

Rental property in Canada or abroad. One copy per property.

04 - Foreign property - detailed

Specified foreign property cost reached C\$250,000, or detailed reporting requested.

05 - Foreign income - year of arrival

Foreign income after becoming Canadian-resident during 2025; use with 06.

06 - Arrival, departure and residency

Moved into/out of Canada or unsure about tax residency. One copy per person.

07 - Business income, self-employment and GST/HST

Sole proprietors, partnerships and applicable GST/HST records. One per business.

08 - Foreign property - simplified

Specified foreign property cost exceeded C\$100,000 but stayed below C\$250,000.

09 - Foreign income and foreign taxes

Other foreign income/taxes. Do not duplicate arrival-year income in 05.

How to complete and return the forms

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Save your answers

Download the files to your computer. Open in Adobe Acrobat Reader where possible. Type into the shaded boxes, select an answer, then Save As with your name and tax year. Close and reopen the saved file to confirm the entries remain.

Follow the answer and instruction columns

In the main form, select Yes, No or Unsure for each person. On paper write Y, N or ?. Follow the What to send or complete column. Leave the spouse column blank if there is no spouse. In other forms, complete only the sections that apply. A blank amount is not zero. Attach extra pages with client name, tax year and section number.

If you have bookkeeping reports

Attach the reports. Do not re-enter income, expenses or other figures already shown in them. Enter only figures missing from the reports, and answer the other factual questions. This also applies to home-office, vehicle, asset and GST/HST schedules.

If you have T slips

Attach all T slips, including amended slips. Do not re-enter the income, tax withheld or any other numbers shown on them. Enter only figures and details missing from your slips and reports. If slip income is already included in bookkeeping revenue, identify this so it is not counted twice.

If you have no bookkeeping reports

Use the business/rental tables only for figures missing from your T slips and other attached records. Provide supporting receipts and any missing vehicle or household costs. Arsen Accounting will calculate allocations and tax adjustments.

Foreign information

The foreign-property test generally uses cost in CAD, not market value. Forms 04 and 08 are alternatives. A first-ever Canadian-resident year may be exempt from T1135; disclose the assets on form 06. Foreign income still needs to be disclosed. Supply original currencies, transaction dates and statements if unsure about conversion.

Return securely

Use the client upload link supplied by Arsen Accounting for completed forms and supporting records. Do not send passwords or sign-in codes. Name extra files clearly and list outstanding records. The questionnaires do not provide CRA access or authorize filing.

For a self-employed client

Start with form 01 and form 07. The home-office and vehicle pages are within form 07. Add any other forms only if their situations apply. A T4 from another job remains employment income in the main intake.

Questions about completing a form: elena@arsenaccounting.com | 647-297-4126