

1. You and your household

Main personal tax intake

Complete pages 1-5 and only the optional worksheets on pages 6-8 that apply. Couples may share this main form; use a separate supplementary form per person. Attach bookkeeping reports and T slips. Do not re-enter figures already shown on them; enter only missing figures and details.

Personal details

Detail	You	Spouse / common-law partner
Full legal name		
SIN / ITN / TTN		
Date of birth (YYYY-MM-DD)		
Email for correspondence / signing		
Telephone		
Mailing address, unit, city and postal code		
Province / territory on Dec. 31, 2025		
Marital status on Dec. 31, 2025		
Status changed? New status and date		
Canadian citizen? Yes / No		
Preferred service language		
Return prepared here, elsewhere or not yet arranged?		
2025 net income (line 23600), if return prepared elsewhere		
If citizen: consent to Elections Canada sharing? Yes / No		
Ontario: receive organ-donation information? Yes / No		

No spouse: leave that column blank. Explain address differences or residency changes on page 5; complete form 06 where relevant. The Ontario choice permits contact with information, not organ-donation consent. Dates: YYYY-MM-DD. Amounts: CAD unless another currency is requested.

2. Income and registered plans

Main personal tax intake

Choose Yes, No or Unsure for each person (on paper: Y, N or ?). If Yes, follow the instruction. Attach T slips, including amended slips; do not re-enter income or other figures already shown on them or in bookkeeping reports. Enter only missing details. Explain Unsure answers on page 5.

Did you receive any of the following in 2025?

Situation	You	Spouse	What to send or complete if Yes
Employment wages (T4 / RL-1)	<input type="text"/>	<input type="text"/>	Attach slips, including amended slips.
Tips, casual pay or other earnings without a slip	<input type="text"/>	<input type="text"/>	Attach payer, dates, gross amount and any tax withheld. Self-employment: form 07.
Pensions, CPP/QPP, OAS/GIS, RRIF or annuities	<input type="text"/>	<input type="text"/>	Attach T4A(P), T4A(OAS), T4A, T4RIF and other pension slips.
EI, workers compensation, social assistance or other benefits	<input type="text"/>	<input type="text"/>	Attach T4E, T5007, RC210 and repayment records.
T4A, scholarship, research grant, RESP or other income	<input type="text"/>	<input type="text"/>	Attach slips and describe income. Fees for services: form 07.
Interest, dividends or trust distributions	<input type="text"/>	<input type="text"/>	Attach T3/T5 and amounts without slips. Foreign income: see page 4.
Investment sales, crypto, gifts of assets or capital losses	<input type="text"/>	<input type="text"/>	Attach trade history, costs, proceeds and fees. Include T5008 and gain/loss reports.
Support received or paid, or other income not above	<input type="text"/>	<input type="text"/>	Attach agreement and payment record; separate child and spousal support. Explain other income on page 5.

Contributions, withdrawals and plan changes

Situation	You	Spouse	What to send or complete if Yes
RRSP / PRPP / SPP contributions or pension changes	<input type="text"/>	<input type="text"/>	Attach receipts for Mar. 4, 2025-Mar. 2, 2026 and earlier unreported receipts. Identify contributor, owner, transfers and repayments.
FHSA opened, contributed to, transferred or withdrawn	<input type="text"/>	<input type="text"/>	Attach opening date, T4FHSA and 2025 records. Identify RRSP transfers separately; exclude 2026 contributions.
RRSP withdrawals, HBP / LLP or other plan notices	<input type="text"/>	<input type="text"/>	Attach slips, CRA balances, repayments and excess-contribution notices. Note spousal plan activity and prior two years of contributions.

Payer/slip still outstanding, income source not listed, or plan question

3. Deductions and credits

Main personal tax intake

Answer each row for You and Spouse. Attach the records requested when Yes. Include amounts paid by someone else, reimbursements and any amount already claimed or included in another schedule.

Did any of these apply in 2025?

Situation	You	Spouse	What to send or complete if Yes
Medical, dental or health-plan costs	☐	☐	Complete the optional Medical worksheet on page 6, or attach an equivalent summary and receipts.
Disability, caregiver or attendant-care support	☐	☐	Page 6: identify the person, relationship, support and DTC status. Attach approval/certification and fee breakdowns.
Childcare or adoption expenses	☐	☐	Attach child name, provider/address/SIN or BN, dates/weeks, costs, receipts, subsidies and custody details; adoption completion date.
Tuition, training or government student-loan interest	☐	☐	Attach T2202/TL11, study dates, loan interest and prior balances. Identify transfer recipient and reimbursements.
Charitable gifts or political contributions	☐	☐	Attach receipts; identify donor and gifts of property. Flag Jan.-Feb. 2025 gifts already claimed in 2024 and prior unused gifts.
Union/professional dues, legal fees or benefit repayments	☐	☐	Attach receipts and purpose. Identify amounts on slips or in business books to avoid duplication.
Investment fees or interest on borrowed money	☐	☐	Attach fees, loan interest, use of borrowed funds and account details. Separate registered-account fees.
Rent, property tax or care/student residence costs	☐	☐	Complete the Housing worksheet on page 7, or attach the same details and receipts.
Move for employment, business or full-time study	☐	☐	Attach old/new addresses, move/start dates, distances to new work/school, income there, costs and reimbursements.
Home purchase, accessibility or secondary-unit renovations	☐	☐	Home purchase: page 8. Renovations: page 7. Attach closing records or renovation invoices, dates and reimbursements.
Other provincial credits, volunteer service or northern residence	☐	☐	List province, residence dates, eligible service hours and supporting certificates/receipts on page 5.
Tax instalments, prior losses or other carryforwards	☐	☐	Attach payment records and latest assessment/related schedules, unless already supplied.

Requested tuition/donation transfers, pension splitting, shared claims or other deductions

4. Additional forms that apply to you

Main personal tax intake

Select Yes, No or Unsure in each column. Complete only the forms directed below. Attach bookkeeping reports and T slips; do not re-enter figures already shown on them. Complete only missing figures and other details.

Which situations apply?

Situation	You	Spouse	What to send or complete if Yes
Employment expenses paid personally	<input type="text"/>	<input type="text"/>	Complete 02 - Employment expenses. Attach signed T2200, or explain if it is not available.
Rental income in Canada or abroad	<input type="text"/>	<input type="text"/>	Complete 03 - Rental income and expenses, one per property. Identify joint owners and shares.
Self-employment, side business, partnership or GST/HST	<input type="text"/>	<input type="text"/>	Complete 07 - Business income, self-employment and GST/HST, one per business. Corporations: contact Elena.
Moved into/out of Canada or unsure about residency	<input type="text"/>	<input type="text"/>	Complete 06 - Arrival, departure and residency, one per person.
Foreign income after becoming resident in 2025	<input type="text"/>	<input type="text"/>	Complete 05 - Foreign income - year of arrival, together with 06.
Other foreign income or foreign taxes	<input type="text"/>	<input type="text"/>	Complete 09 - Foreign income and foreign taxes. Do not repeat income already supplied in 05.
Foreign accounts, shares, rental property or other foreign assets	<input type="text"/>	<input type="text"/>	Use the foreign-property directions below to choose 08 or 04. Disclose foreign income separately, even below these thresholds.

Foreign property: choose one worksheet

Combined specified foreign property COST exceeded C\$100,000, but stayed below C\$250,000 all year	Complete 08 - Foreign property - simplified.
Combined specified foreign property COST reached C\$250,000 or more at any time	Complete 04 - Foreign property - detailed.
First-ever Canadian tax-resident year, or unsure about cost/exclusions	Complete 06 for first residency; attach asset statements and ask Elena to confirm which foreign-property form is needed.

Use cost in Canadian dollars, not current market value. Include foreign shares held with Canadian brokers. Registered-plan holdings and personal-use property are generally excluded. First-ever resident individuals are generally exempt from T1135 for that year; returning residents are not automatically exempt. Foreign-company, trust and insurance interests may need separate review.

Foreign holdings or form-selection questions

5. Dependants, special situations and review

Main personal tax intake

Dependants you support - attach extra rows if needed

Name / relationship / country	Birth date / SIN if issued	2025 net income / living dates
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Shared custody, other supporting people, impairment, childcare arrangements or household changes

Does any of this apply?

Situation	You	Spouse	What to send or complete if Yes
Property sale, gift, transfer or change in use	<input type="text"/>	<input type="text"/>	Complete the Property worksheet on page 8. Include your principal residence and conversions to/from rental use.
First return, death, bankruptcy, CRA dispute or residency issue	<input type="text"/>	<input type="text"/>	Provide dates, representative authority and CRA/legal records below. Residency: also form 06.
Foreign company/trust, family-business income or assets held for others	<input type="text"/>	<input type="text"/>	Provide entity/country, ownership/control, relatives, contributions, distributions and loans for review.
Farming/fishing, exempt income, special elections or another unusual transaction	<input type="text"/>	<input type="text"/>	Describe the facts below; attach supporting records and previous advice/elections.

Explain Yes/Unsure answers, estimates, missing records and anything not covered (attach a page if needed)

CRA access: Active / Needs setup / Unsure (You and Spouse)

Direct deposit: Up to date / Needs update / Not enrolled (You and Spouse)

Arrange CRA authorization separately. Do not send passwords, login codes or bank details in this form.

Completed by

Date (YYYY-MM-DD)

Attach slips, receipts, latest assessment/prior return if available, and applicable forms. Save and reopen the PDFs to check your entries; return through the secure upload link supplied by Arsen Accounting. Filing authorization is separate. Clarification may be needed after review.

6. Optional worksheet: medical and care

Main personal tax intake

Complete only if medical, disability or care costs apply. You may attach a summary containing the same information instead. Include paid receipts, reimbursements and relevant unclaimed receipts from the preceding year. Identify amounts already claimed; Elena will determine the claim period.

Medical and health-plan expenses

Patient / provider / expense	Payment date / currency	Paid / reimbursed / prior claim

Private health/dental premiums: payer, period, amount and any amount already on a slip

Medical travel: patient, purpose, dates, destination, km, companion and travel/lodging costs

Attendant/nursing care, equipment or disability supports: person, provider, work/study purpose and fee breakdown

DTC: person, relationship, approved/pending/not applied, approved years and expiry; attach notice/T2201

Support provided, recipient net income/country and others sharing the costs or claim

Fertility/surrogacy: payer, provider/location, dates, costs, reimbursements and any duplicated expenses

Provide tax-related receipts and certifications, not full medical histories. Label additional pages with the patient name and tax year.

7. Optional worksheet: housing and renovations

Main personal tax intake

Complete only the sections that apply, or attach a summary containing the same information. Identify who paid each amount and costs already entered elsewhere.

Housing costs during 2025

Address / landlord or municipality	Dates / months / payer	Rent or property tax paid

Co-occupants and their payments; subsidies; care/student residence; reserve or northern location

Accessibility or qualifying secondary-unit renovations

Property address and owners / ownership shares

Qualifying person / relationship / birth date / DTC status

Project description and any self-contained unit facilities

Project start / completion / occupancy dates

Costs / reimbursements / other claimants

Attach invoices, payments, supplier details and permits. Identify costs also on the Medical worksheet.

Additional housing or renovation details; documents still coming

8. Optional worksheet: property transactions

Main personal tax intake

Complete for a home purchase, property sale, gift, transfer or change in use. Include principal residences and cottages, even if you believe a sale is exempt. Use one copy per property or attach equivalent schedules.

Home purchase, sale, gift or change in use

Property address / country

Owners / shares / relationship

Purchase date / cost

Sale / transfer / change-of-use date

Proceeds / fees / valuation at change

Years used as home; rental/business use dates; other homes used by your family

Prior CCA, elections or principal-residence designations; ownership changes

For a purchase: occupancy date and homes you/spouse owned and occupied in 2021-2025; disability-related move

If sold within 365 days: reason and life event; purchaser relationship

Acquisition, improvement and selling costs

Cost / supplier / date	Amount / currency	Record / included in closing statement?

Attach closing statements, acquisition/improvement costs, valuations and selling fees. Identify any overlapping property details in form 03 - Rental income and expenses.