

Canadian Personal Tax Checklist - 2025

Personal Information

- Social Insurance Number (SIN)
- Current address, phone, email
- Marital status & changes
- Date of birth for self, spouse, dependents
- Dependents info (childcare, school, adoption)

Income Information

- T4 (employment income), T4PS, T4E
- T4RSP / T4RIF (pension / RRSP withdrawals)
- T4A (other income, scholarships, pensions)
- Self-employment/business income & expenses
- Investment income: T5, T3, capital gains/losses
- Rental income & expenses
- Other income: CPP/OAS, social assistance, foreign income, scholarships/grants

Deductions

- RRSP contributions
- Professional/union dues
- Childcare expenses
- Support payments (alimony/spousal support)
- Employment expenses (T2200)
- Moving expenses
- Carrying charges for investments
- Student loan interest

Credits

- Medical expenses (self, spouse, dependents)
- Disability tax credit
- Adoption expenses
- Tuition/Education/Textbooks (T2202)
- Property taxes or rent receipts
- Charitable donations
- Political contributions
- Volunteer firefighter / search & rescue credit

- Home accessibility or energy-efficient renovations

Other Information

- Previous year Notice of Assessment
- Installment payments made
- Foreign property over \$100,000 (T1135)
- Digital assets (crypto) records

Tips:

- Keep all receipts & slips organized.
- Confirm RRSP contribution deadlines (usually March 2, 2026).
- Accurate bookkeeping is essential for self-employed or rental income.
- Consider tax software or a professional for complex situations.