

CONDENSED PERSONAL TAX CHECKLIST

Name of primary contact: _____ Name of spouse (if applicable): _____

Have any of the following changed for either yourself or your spouse in 2025? If yes, please provide details.

Phone number ☐ No ☐ Yes _____

Email address ☐ No ☐ Yes _____

Mailing address ☐ No ☐ Yes _____

Province of residence ☐ No ☐ Yes _____

Marital status ☐ No ☐ Yes _____

Your name ☐ No ☐ Yes _____

Your dependent(s) ☐ No ☐ Yes _____

Banking information ☐ No ☐ Yes Log into your CRA My Account for Individuals to update direct deposit information before submitting your tax documents to our office. We can no longer change your direct deposit information with the CRA.

Did you sell any property in 2025? ☐ No ☐ Yes

How would you like to receive your tax return? ☐ Electronically by email ☐ Paper

How do you prefer to sign your T183 and other forms? ☐ Electronically via DocuSign ☐ Paper

Would you like to claim trips taken in 2025 for the northern travel deduction? ☐ No ☐ Yes, please complete chart below

	Dates of Trips Start End		Destination	Cost of accommodation only	Names of family members in your household who travelled
Trip 1				\$	
Trip 2				\$	
Trip 3				\$	
Trip 4				\$	
Trip 5				\$	
Trip 6				\$	
Trip 7				\$	
Trip 8				\$	