



PLEASE ENSURE THAT EMAIL ADDRESSES AND CELL PHONE NUMBERS ARE UNIQUE TO EACH TAX PAYER

Primary Contact Information

Name: _____

SIN (if new to the firm): _____

Date of Birth (if new to the firm): _____

Cell Phone: _____

Alternate Phone: _____

Home Work/Business Other _____

Email: _____

Spouse Information (if applicable)

Name: _____

SIN (if new to the firm): _____

Date of Birth (if new to the firm): _____

Cell Phone: _____

Alternate Phone: _____

Home Work/Business Other _____

Email: _____

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
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Current Mailing Address:

Address: _____

City: _____ Prov: _____ Postal Code: _____

Did you move during the year? No Yes **Date of move:** _____

Province of Residence on December 31, 2025: _____

What was your marital status on December 31, 2025?	Married	Common Law	Widowed
	Divorced	Separated	Single

Did your marital status change in 2025? If yes, provide date of change: _____

Did you change your first or last name in 2025? If yes, provide new name: _____

[illegible]

	Primary	Spouse
Are you a Canadian citizen?	Yes No	Yes No
Do you authorize CRA to give your name, address, date of birth and citizenship to Elections Canada to update the National Register of Electors?	Yes No	Yes No
Did you own foreign property with a cost of \$100,000 or more at any time during the year? (includes cash, property in the U.S. or other foreign country, investment portfolios with U.S. or international holdings, digital currency such as bitcoin, etc.)	Yes No	Yes No
Did you sell property (principal residence, rental property, vacation home, etc.) or change the use of a property (eg. change a principal residence to a rental property or vice versa) during the year? Date of sale: _____ Date of original purchase: _____ Selling price: \$_____ Original purchase price: \$_____	Yes No	Yes No
If you are an Alberta resident, do you authorize CRA to provide your email address to the Government of Alberta and the Ministry of Hospital and Surgical Health Services to send you information about organ & tissue donation? If you are a BC resident, do you authorize CRA to provide your name, email address and postal code to BC Transplant to contact you or send you information about organ & tissue donation?	Yes No	Yes No
Did you earn tips in 2025? If yes, please provide total tips received: \$ _____	Yes No	Yes No
Did you sell bitcoin or any other cryptocurrency during the year?	Yes No	Yes No
Internet Business Activity: Do you have a webpage or websites from which you earn income? If yes, provide website address: _____ Percentage of gross income generated from the website: _____%	Yes No	Yes No
Did you open a <i>First Home Savings Account</i> (FHSA) in 2025? Did you make any contributions, transfers, or withdrawals in 2025?	Yes No	Yes No
Did you withdraw RRSP's or FHSA's to purchase a home for you or your spouse?	Yes No	Yes No
Did you withdraw RRSP's to finance full-time education for you or your spouse?	Yes No	Yes No
Is anyone else in your household (for whom we are not preparing their personal tax return) claiming the Northern Residents Deduction?	Yes No	Yes No
Do you have or share custody of a child after a relationship breakdown? Does this child live with you? If yes, how often? Full-time Part-time	Yes No	Yes No
In 2025, did you spend at least 200 hours acting as a volunteer firefighter or a search and rescue volunteer?	Yes No	Yes No
Did you pay personal tax installments for the 2025 taxation year? If yes, \$ _____	Yes No	Yes No
Do you have access to CRA's My Account for Individuals?	Yes No	Yes No
Has your banking information changed since your last direct deposit from CRA? If yes, have you already changed your direct deposit details using CRA's My Account for Individuals or your online banking?	Yes No	Yes No

Northern Travel Deduction

Please include details for trips you and/or your family members took in 2025. Trips may include camping, weekend getaways, family vacations, etc. Please include as many trips as you can to ensure the best deduction.



No trips taken in 2025

	Dates of Trip 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				\$	

Medical Travel

Please include details for medical trips you and/or your family members took in 2025, where equivalent medical services were not available near your home.

	Dates of Trip Start End		Name of Patient	Destination and Reason for Trip	Accommodation Costs	Parking Fees	Reason patient required a driver (if applicable)
Trip 1					\$	\$	
Trip 2					\$	\$	
Trip 3					\$	\$	
Trip 4					\$	\$	
Trip 5					\$	\$	
Trip 6					\$	\$	

Check the boxes below that are applicable to you and your spouse's tax return and include any additional details.

Income	Primary	Spouse
T3 – Estate/Trust/Mutual funds income		
T4 – Employment income		
T4A – Other income		
T4AP – CPP benefits		
T4A OAS – Old Age Security		
T4E – Employment insurance benefits		
T4RIF – RRIF Income		
T4RSP/T4FHSA – RRSP/FHSA income/withdrawal		
T5 – Interest and dividend income		
T5007 – Social assistance/WCB		
T5008 – Statement of security transactions – provide the cost when purchased		
T5013 – Limited partnership income		
Alimony/Spousal support received		
Scholarship, fellowship, bursary		
Foreign sources		
Capital Gains/Losses – provide an investment statement from your advisor		
Bitcoin or other cryptocurrency transactions		
Income from sources of the sharing economy such as <i>Skip the Dishes, Airbnb, VBRO, Uber</i> , or other online or social media activity		
Other sources of income:		
Deductions, Tax Credits and Expenses	Primary	Spouse
RRSP/FHSA contribution receipts		
Union, professional and like dues		
Child care expense		
Employment expenses – T2200 required		
Moving expenses		
Spousal and/or child support paid		
Adoption related expenses		
Charitable and/or political donations		
T2201 Disability tax credit		
T2202 Tuition and education		
T2202 Tuition transferred from dependent		
Interest paid on Student Loans		
Are you a first-time home buyer?		
Caregiver amount		
Investment counsel and management fees		
Eligible educator school supply tax credit: Teachers/Early Childhood Educator school supplies		
Interest on money borrowed to purchase investments		
Pension split: Spouses may jointly elect to split certain pension income reported by the other spouse		
Medical expenses		
Premiums paid to a private health plan e.g. Alberta Blue Cross		
Costs paid for surrogate mothers or donors and fertility treatments		
Canada training tax credit		
Home accessibility tax credit: home renovations for disabled person or senior citizen		
Labour mobility deduction for eligible tradespeople and apprentices working in the construction industry at a temporary work location		
Multigenerational home renovation tax credit		
Tools acquired by tradespersons and eligible apprentice mechanics		
Travel costs for tradespersons and apprentices engaged in construction activity at a job site at least 120 km away from ordinary place of residence		