

Howland Tax Services International

2025 Personal Tax Organizer (Canada)



Personal Information

You	Your Spouse
Name	Name
Social Insurance #	Social Insurance #
Date of Birth	Date of Birth
Marital Status:	
<input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Common-Law <input type="checkbox"/> Divorced <input type="checkbox"/> Separated <input type="checkbox"/> Widowed	
Address	Address (if different)
Postal Code	Postal Code
Phone	Phone
Email	Email
Canadian Citizen?	Canadian Citizen?

Did your marital status change during the year?

Yes No

If yes, indicate change and date of change: _____

If you are married or living common-law, and we are not preparing your spouse's return, please provide a complete copy (all pages) of your spouse's tax return and income tax slips.

Dependants	1	2	3	4
Name				
Date of Birth				
Relationship				
Social Insurance #				
Net Income				

Did you receive the Canada Child Benefit in 2025?

Yes No

Did you pay childcare expenses in 2025?

Yes No

If yes, please provide receipts and indicate the Social Insurance Numbers of individual daycare providers:

Do you authorize Canada Revenue Agency to provide your name, address, and date of birth to Elections Canada for the National Register of Electors?

Yes No

Did you immigrate to or emigrate from Canada during 2025?

Yes No

If yes, indicate change of residency and date of change

Do you want to start or change Direct Deposit of refunds and benefits into your bank account (income tax refunds, GST/HST Credits, Canada Child Benefits)? If yes, provide the following:

Branch Number

Institution Number

Account Number

COVID-19 Benefit Repayments

Did you make any federal, provincial or territorial COVID-19 benefit repayments during 2025? If yes, please indicate amounts and dates of repayments:

Sharing, Gig, and Peer-to-Peer Economy Workers; Social Media Influencers

Residents of Canada are required to report worldwide income from all sources, including foreign and domestic commerce. Non-residents are subject to Canadian income tax on most Canadian-sourced income paid or credited during the year unless all or part of that income is exempt under a tax treaty.

Gross income from digital platforms is generally reported as business or rental income, with the expenses incurred to earn the income deducted on a business or rental statement. This income may be from platforms such as Lyft, Uber, AirBnB, FlipKey, VRBO, Facebook Marketplace, Fiverr, Clickworker, Crowdsource, Uber Eats, Skip the Dishes, Kijiji, Etsy, eBay, Amazon, Facebook (Meta), Instagram, TikTok, Twitch, X (Twitter), OnlyFans, YouTube, or independent blogs.

Short-term Rental Expenses

You are no longer able to deduct expenses (including interest) related to "non-compliant" short-term rentals. A short-term rental is a residential property that is rented or offered for rent for a period of less than 90 consecutive days, while a non-compliant short-term rental is a short-term rental that: 1. is located in a province or municipality that does not permit short-term rentals to operate at that location; or 2. does not comply with all applicable provincial or municipal registration, licensing and permit requirements for operating a short-term rental.

Documents Needed to Prepare your Return(s)

- New clients: provide complete copies of the last tax returns filed and the notices of assessment
- Copies of income tax slips received, including T1204, T3, T4, T4A, T4A(OAS), T4A(P), T4E, T4RSP, T4RIF, T5, T5008, T5013, U.S. Social Security, other foreign pensions, etc.
- RRSP or PRPP contribution receipts
- Charitable donation receipts
- Receipts for contributions to federal or provincial political parties
- Employment expenses: Form T2200 is required from your employer
- First-time home buyer: did you purchase a qualifying home in 2025 using a Home Buyers' Plan withdrawal?
- First-time home buyer: did you purchase a qualifying home in 2025 using a First Home Savings Account (FHSA) withdrawal?
- Investment expense receipts (interest expense, investment counsel fees, management fees, etc.)
- Medical expenses: provide all receipts and statements for reimbursements from medical plans
- Moving expense receipts, if the move brought you 40 kms closer to workplace or school
- Student loan interest forms
- Tradesperson tools and expenses: provide receipts
- Tuition fees: obtain T2202 *Tuition and Enrolment Certificate* from educational institution
- Receipts for union dues
- Receipts for digital news subscriptions to qualified Canadian journalism organizations
- Firefighter or search and rescue volunteers: completed 200 hours of eligible services during the year?
- Income and expenses from rental properties, businesses or partnerships
- Documentation or details of assets acquired and sold during the year (e.g. stocks and bonds sold outside RRSP, real estate, business equipment and autos, etc.)
- Details on alimony/maintenance received or paid
- Assessment notices and correspondence received from Canada Revenue Agency
- Receipts for tax paid by installments

Please provide details regarding any other income or expenses items not listed above:

Alberta Residents: Organ and Tissue Donor Registry

You can authorize CRA to provide your email address to the Government of Alberta (GOA) and the Ministry of Hospital and Surgical Health Services (HSHS), to receive information by email about organ and tissue donation (you are not actually consenting to organ and tissue donation). The process of organ and tissue donation is governed by the Human Tissue and Organ Donation Act. Health and personal information are collected in accordance with the Health Information Act and the Protection of Privacy Act.

Do you want to allow CRA to share your email address with GOA and HSHS?

Yes No

British Columbia Residents: Organ and Tissue Donor Registry

You can authorize CRA to provide your full name, email address and postal code to BC Transplant, so that it can email information to you about organ and tissue donation (you are not actually consenting to organ and tissue donation). Your information will be collected and used in accordance with the Freedom of Information and Protection of Privacy Act (British Columbia).

Do you want to allow CRA to share the above information with BC Transplant?

Yes No

British Columbia Residents: Renter's Tax Credit

If you are a low- to moderate-income individual or family (adjusted income of \$84,764 or less), and you occupied and paid rent at an eligible rental unit in BC for at least six one-month periods, please provide the following for each rental unit:

Rental address

www.nature.com/scientificreports/

Rent paid at address

Number of months of tenancy at this address

Name of landlord or company payment was made to

Foreign Property

Foreign property includes funds held outside Canada, shares of non-resident corporations, amounts owed to you by non-residents, interests in non-resident trusts, real property (real estate), and other property outside Canada. Did you own foreign property at any time in 2025 with a total cost of more than \$100,000 CAD?

Yes No

If yes, please provide details:

Cost of property _____

Type of property _____

Location of property (country) _____

If you had foreign property costing more than \$100,000 Canada Revenue Agency must receive Form 1135 *Foreign Income Verification Statement* on or before the due date of your income tax return to avoid penalties. If your foreign property cost more than \$250,000 CAD, we will need more information to complete Form 1135.

U.S. Citizens

Did you have more than \$10,000 in Canadian financial accounts at any time during 2025 (including RRSP, RRIF, RESP, TFSA, bank, or investment accounts)? If yes, FinCEN Report 114 *Report of Foreign Bank and Financial Accounts* (FBAR) should be filed using the BSA E-Filing System by April 15. If you want us to complete and file this form for you, please provide name and addresses of financial institutions, account numbers and types, and the highest amounts in each account during 2025.

Note that, if you can't make the April 15 deadline above, you are allowed an automatic extension to October 15. You don't need to request it to take advantage of this later filing date, but you should enter the reason for the late filing on your FBAR.

If you held Canadian financial assets in 2025, you may also have to file Form 8938 *Statement of Specified Foreign Financial Assets* or Form 8621 *Information Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund* with your U.S. income tax return(s).