

CHECKLIST FOR 2025 TAX RETURNS

To help you: Data compilation templates are available on our website <https://jolyriendeau.com> in the "DOCUMENTS UTILES" section for these categories:

- Assainissement des eaux usées (for waste treatment systems)
- Dépenses automobile (vehicle expenses)
- Dépenses de bureau à domicile d'un employé (home office expenses)
- Entente de partage des enfants à charge (for eligible dependent)
- Revenus de location (rental income)
- Travailleur autonome (self-employed)

No password is required to access these templates. If you need an english version of them, please let us know.

Changes in 2025 that may affect your tax returns (provide details if applicable)

- Change of marital status, new spouse, separation (nature of the change and exact date)
- New child (name and date of birth)
- Relocation (new address, is it because of work?)
- Have you sold, transferred or given away any real estate (primary or secondary residence, land or other) in 2025?
- Have you started renting in 2025 a property that you previously used for personal use?
- Have you started to use a property for personal use in 2025 that you were renting before that time?
- Have you registered or deregistered from the Public Prescription Drug Insurance Plan (RAMQ) in 2025?

Employment

- T4 slip (federal) and RL-1 slip (Quebec)
- T2200 and TP64.3 for declaration of Conditions of Employment for Working at Home. This form must be signed by the employer and you.
Also eligible for a GST/QST rebate if the employer is a GST/QST registrant. (Employer's QST number required)
- T4A slip
- Commissions
- Grants for research, studies, etc.

Benefits

- T4E - Employment Insurance
- T5007 and RL-5 - SAAQ and CNESST Benefits

Government or private pension plan benefits

- T4A (OAS) - Statement of Old Age Security
- T4A (P) and RL-2 - Statement of CPP or QPP Benefits
- T4A and RL-2 - Statement of Pension, Retirement, Annuity & Other Income
- T4RSP - Statement of RRSP Income
- T4RIF - Statement of Income from a RRIF
- T4FHSA - Statement of FHSA (First Home Savings Account)

Pension from another country

- U.S.A. (indicate if the payment started before 01/01/1996)
- Others

Statement of Partnership Income

- T5013 and RL-15
- Individual Resource Investment Statement

Rental income (see template on our Website)

- Gross Income
- Expenses
- Addition and disposition of capital assets (a donation is a disposition)

Investment Earnings

- T3 and/or T5 Slips
- Capital Gain / Loss (Non-RRSP/TFSA Broker Statement)
- Information on foreign assets (including virtual currency, for example Bitcoins) costing more than \$100,000 CAD (T1135 / TP-1079.8.BE)
- Have you received, held or disposed of virtual currency (selling, exchanging, mining, etc.)?

Self-Employment or Professional Income (see template on our website)

- Gross Income
- Expenses
- Addition and disposition of capital assets (a donation is a disposition)

Other Income

- Support Payments
- Income from RRSP & RDSP
- Scholarships
- Retirement or severance allowance
- Other Income
- HBP & LLP

Deductions

- RRSP, FTQ, CSN Fondation contributions
- Union or Professional Dues
- RL-24 for child care
- Moving expenses (because of work or studies)
- Deductible support payments and legal fees incurred
- Bank or investment statement: interest and carrying charges on investments
- Employment expenses
- Interest paid on student loan

Tax Credits

- Receipts for sports-related or arts-related activities (Children under 16)
- Adoption Expenses
- Assisted procreation (eligible as a medical expense)
- T2202 & RL-8 - Tuition and Enrolment Certificate (available on the institution's website)
- Medical bills (Detailed statements from drugstores)
- T2201 & TP-752.0.14 forms completed by your doctor, if you are eligible for the first year for the disability tax credit
- RL-22 - Multi-employer Insurance Plan (Construction Employees)
- RL-31 - Information on the Occupancy of a Dwelling
- Official receipts: charitable donations to registered organizations
- Official receipts: contributions to political parties
- Instalments payments statements for the year
- Eligible invoices (housekeeping services, groundskeeping, snow removal, supervision, nursing services, etc.) for the purposes of the tax credit for home support for elderly aged 70 and over and/or form TP-1029.MD.S
- Invoices eligible for the Tax credit for the Upgrading of Waste water treatment systems (septic systems and drainfields) (form TP-1029.AE.A required)
- Digital News Subscription Tax Credit (DSTC)
- Multigenerational Home Renovation Tax Credit (MHRTC)
- Other credits or deductions

Miscellaneous

- Have you provided any support to someone 18 years of age or older with a severe and long-term impairment in mental or physical functions?
- Have you been living with an eligible relative who is 70 or older and not your spouse?
- Have you opened a FHSA account in 2025 ? (or became a successor holder)
- Copy of your previous year's Notice of Assessment (2024) (Federal & Provincial)
- If you are a first-time home buyer, you may be eligible for tax credits
- Country of birth if other than Canada: _____
- Number of days in the United States between January 1 and December 31:
Mr. : _____ Mrs. : _____
- Sale **for profit** of personal-use property (ex. vehicle, ATV, RV, boat, etc.)
- Sale of a property owned for less than 365 days
- Short-term rental income (e.g. cottage, Airbnb, etc.) and copy of relevant permits

AS THIS CHECKLIST IS NOT EXHAUSTIVE, PLEASE ALSO PROVIDE ANY DOCUMENTS THAT YOU FEEL WOULD BE HELPFUL.