



Chartered Professional Accountants

287 Richmond Road
Ottawa, ON K1Z 6X4
T 613-728-5831 | F 613-728-8085
E info@ggfl.ca | W www.ggfl.ca

2025 Personal Tax Organizer

Please complete each box below and provide details and/or receipts where necessary.

Personal Information

Name: _____ Phone: (cell) _____
Address: _____ (home) _____
_____ (work) _____
E-mail: _____

Marital Status: _____

Date of change (if applicable): _____

Are you a U.S. citizen/resident/green card holder? Yes No

If yes, please specify: _____

Dependants (if not previously provided):

Name: _____	Name: _____
Date of birth: _____	Date of birth: _____
SIN: _____	SIN: _____

Did you dispose of your principal residence in the year? Yes No

If yes, year of purchase: _____ Sale price: _____ Ownership %: _____

Did you purchase your first home in 2025? Yes No

If you do not wish your name, address, and date of birth to be given to Elections Canada, please check the box.

Did you own Foreign Investments (includes US stock at CDN brokerage) costing over \$100,000 CDN at any point in 2025? Yes No

2025 Personal Tax Organizer

Income

- T4 / RL1 - Employment Income
- T4A (OAS) - Old Age Security
- T4A(P) / RL2 - Canada or Quebec pension
- T4A / RL1 / RL2 - Pension / Other Income
- T4RIF / T4RSP / RL2 - RIFF / RRSP Income / HBP Withdrawal
- T4E / RL6 - Employment Insurance
- T4FHSA/RL32 - First Home Saving Account
- T4A-RCA - Retirement Compensation Arrangement trust

Other: _____

Other Income

- Business/Professional Income
 - T2125 Summary Enclosed
- Rental Property Income
 - T776 Summary Enclosed
- T5013 / RL15 - Partnership Income
- Spousal Support Received
- Scholarship, Bursary & Fellowship Income
- Farming Income
 - T2042 Summary Enclosed
- Sale of real estate - include all documents of purchase and sale *

Other: _____

Investments

- T3 / RL16 - Trust / Mutual Fund Income
- T5 / RL3 - Dividend / Interest Income
- Capital Gains or Losses** (brokerage report / self-directed, T5008 / RL18)
- Crypto Assets detailed gain/loss information
- T1135 - Foreign Income Statement
- T1134 - Foreign Affiliate Reporting

Other: _____

Deductions and Tax Credits - Please provide receipts

- Adoption Expenses
- Charitable Donations
- Child Care Expenses (including caregiver's social insurance number if not a childcare organization)
- Disability Tax Credit (If first year please provide T2201)
- Eligible Educator School Supply Credit
- Employment Expenses (enclose signed T2200)
- Flow through shares (T101 if applicable)
- Home Accessibility Expenses - (65 or older and renovated your home to be more accessible)
- Home Buyers Amount
- Interest Paid on Investment Loans or Student loans
- Medical
 - Attendance Care / Care in a Facility / Nursing home
 - Medical Insurance Premiums
 - Medical Insurance Claim Summary (by service date)
 - Medical Receipts (if not covered by insurance)
- Moving Expenses (more than 40 kms for work/school)
- Multigenerational home renovation credit
- Non-Registered Investment Management Fees
- Political Contributions
- Property Taxes (final 2025 bill) / Rent Receipts
- RRSP Contributions (remainder of 2025 and first 60 days of 2026)
- Support paid - Child and/or Spousal (provide agreement)
- Tuition (enclose completed and signed T2202 or TL11A foreign tuition)
- Union or Professional Dues

Other: _____

*This includes any disposition of personal use homes and cottages.

**Please provide the full investment reporting package from your broker.