LOHN CAULDER
CHARTERED PROFESSIONAL ACCOUNTANTS
A Limited Liability Partnership of Corporations

Personal Tax Checklist

PERSONAL INFORMATION

Full name	S.I.N.	Birthdate	Are you a Canadian Citizen? YES ☐ NO ☐	Are you a U.S Citizen or green card holder? YES ☐ NO ☐
Apt/Suite – Building Number Street Name, City, Postal Code			Marital status	Primary phone / Secondary phone
Email	Any family member disabled? YES ☐ NO ☐		Do you authorize CRA to provide information about you to Elections Canada? YES ☐ NO ☐	

SPOUSE'S INFORMATION

Full name	S.I.N.	Birthdate	Are you a Canadian Citizen? YES ☐ NO ☐	Are you a U.S Citizen or green card holder? YES ☐ NO ☐

If we are not preparing your spouse's tax return: **Spouse's taxable income from line 26000 of their tax return:** ______________________

If your marital status changed during the year, please provide the date it changed (MM/DD/YYYY) __________________________________

CHILDREN'S INFORMATION

Full name – Child 1	S.I.N.	Birthdate	Are you a Canadian Citizen? YES ☐ NO ☐	Are you a U.S Citizen or green card holder? YES ☐ NO ☐
Attending post-secondary institution? YES ☐ NO ☐ - IF YES please attach T2202A				
Full name – Child 2	S.I.N.	Birthdate	Are you a Canadian Citizen? YES ☐ NO ☐	Are you a U.S Citizen or green card holder? YES ☐ NO ☐
Attending post-secondary institution? YES ☐ NO ☐ - IF YES please attach T2202A				
Full name – Child 3	S.I.N.	Birthdate	Are you a Canadian Citizen? YES ☐ NO ☐	Are you a U.S Citizen or green card holder? YES ☐ NO ☐
Attending post-secondary institution? YES ☐ NO ☐ - IF YES please attach T2202A				

SALE OF PRINCIPAL RESIDENCE

Did you sell your principal residence during the year? YES ☐ NO ☐

IF YES: Year of acquisition: ________________ Proceeds of disposition: ________________

Did you own any other properties that could qualify as a principal residence? YES ☐ NO ☐

FOREIGN REPORTING

Do you own foreign assets with a cost greater than $100,000 CAD? YES ☐ NO ☐

INCOME SOURCES CHECKLIST

Employment (T4 or T4A)	☐	RRSP, RRIF, RESP (T4RSP/T4RIF/T4A)	☐
Government pensions (T4A[OAS]/T4A[P])	☐	Estates/trusts/mutual fund (T3)	☐
Employment Insurance (T4E)	☐	Interest/dividends/capital gains (T3/T5/T5013)	☐

TAX DEDUCTIONS / CREDITS CHECKLIST (with official receipts)

RRSP contributions	☐	National Student Loan Interest	☐
FHSA contributions	☐	Medical expenses (net of any reimbursements)	☐
Union/professional dues	☐	Charitable or political donations (official receipts)	☐
Child care Expenses (include name and SIN of recipient)	☐	First-time Home Buyer	☐
Moving expenses (if at least 40 kms closer to work)	☐	Eligible educator who pays for their own supplies	☐
Accounting fees (other than Lohn Caulder's fees)	☐	Tuition fees (T2202A – signed by student)	☐
Interest/fees paid on investments (non-registered accounts)	☐	Government subsidy benefits (i.e. CERB / CRB) repaid	☐

OTHER IMPORTANT DOCUMENTS CHECKLIST			
Mutual fund investment summary statement	☐	Tax shelters (T101/T5013/Annual Reports)	☐
Sale of property: address, cost of property	☐	T2200 Employer Authorization for Expenses (Please see **Appendix C** below)	☐
Sale of property: Seller's Statement of Adjustments	☐	Court-Ordered Spousal Support Payments *Paid*	☐
Sale of shares: gain/loss summary from broker	☐	Court-Ordered Spousal Support Payments *Received*	☐
New clients: Notice of Assessment for prior year	☐	**New clients**: T1 tax return for prior year	☐
New clients: complete CRA authorization (instructions included after Appendix C below)	☐	**All clients**: signed T1 engagement letter	☐

OTHER INFORMATION CHECKLIST (please provide if necessary)			
Rental income and expenses (please provide detail listing of rental income and expenses per property below in **Appendix A**)	☐	List of foreign property owned, including: Country of origin Fair market value at Dec 31 Highest fair market value for the year Total income and total capital gains	 ☐ ☐ ☐ ☐
Self-employment income and expenses (please provide detail listing of the income and expenses below in **Appendix B**)	☐		
Employment/commission expenses (please provide detail listing of employment expenses in **Appendix C**)	☐	Other: Other:	☐ ☐

DECEASED TAXPAYER CHECKLIST			
Death certificate	☐	Complete copy of will and probate	☐
New mailing address for estate, if applicable ____			☐

INSTALMENT PAYMENTS	
Have you made instalment payments for the tax year? IF YES: how much for yourself? IF YES: how much for your spouse? IF YES: how much for each child?	YES ☐ NO ☐ $__________________ $__________________ $__________________ $__________________ $__________________

DIRECT DEPOSIT/ TAX REFUND	
Has your direct deposit information already been provided to CRA?	YES ☐ NO ☐
IF NO: if you would like to have tax refunds directly deposited, provide us with either:	
A void cheque	☐
OR	
Branch Number (5 digits)	________________________
Institution Number (3 digits)	________________________
Account Number (maximum 12 digits)	________________________

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APPENDIX A: RENTAL PROPERTY SUMMARY *

(Please prepare this form for EACH rental income-producing property)

DETAILS OF PROPERTY

Address of rental property: ____ City ____________________

Province/State ____________________Postal Code _______________ Country ______________________

Ownership percentage (%) ______________

Full name and SIN of co-owners ____

Is your rental property a short-term rental (rented less than 90 consecutive days)? YES ☐ NO ☐

IF YES, during which periods of 2025 was it a short-term rental? ___________________________________

IF YES, does this rental property comply with provincial or municipal registration, licensing, location or permit requirements in 2025? YES ☐ NO ☐

RENTAL INCOME		Did you pay for any major renovations or large purchases (i.e. appliances) during the tax year? YES ☐ NO ☐
Gross rental income	$________________	
RENTAL EXPENSES		IF YES, please provide the details of the renovations/purchase and provide the cost amount below:
Advertising	$________________	
Insurance	$________________	
Mortgage interest	$________________	
Office expense	$________________	Amount / Description
Legal & accounting	$________________	$________ ______________________
Management & admin fees	$________________	$________ ______________________
Repairs & maintenance	$________________	$________ ______________________
Property taxes	$________________	$________ ______________________
Travel	$________________	$________ ______________________
Utilities	$________________	
Other (please specify)		
______________________	$________________	
______________________	$________________	
______________________	$________________	
______________________	$________________	
NET RENTAL INCOME	$________________	

* While you do not need to send us your individual expense receipts, please note that Canada Revenue Agency may ask to see these at some point after your tax return has been filed. Acceptable receipts must be issued by the vendor (not a credit card statement) and should include the date, vendor name, and amount paid. CRA also requires that automobile expense claims be supported by a mileage log.

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APPENDIX B: SELF-EMPLOYED INCOME AND EXPENSES *

(Please provide this form for EACH Business)

DETAILS OF BUSINESS

Name of business ___________________________ Type of business ___________________________

Names of partners and percentage (%) owned respectively ____

REVENUE	
Gross revenues/receipts/sales	$__________________________
EXPENSES	
Advertising	$__________________________
Meals and entertainment	$__________________________
Bad Debts	$__________________________
Insurance	$__________________________
Interest and bank charges	$__________________________
Licenses, dues, and memberships	$__________________________
Office expenses	$__________________________
Supplies	$__________________________
Professional dues	$__________________________
Rent	$__________________________
Repairs and maintenance	$__________________________
Salaries	$__________________________
Travel	$__________________________
Telephone and utilities	$__________________________
Vehicle expenses	
Year, make, and model	____
KM driven for business *	__________________ KMs
Total KM driven *	__________________ KMs
If leased, date lease began?	__________________ (MM/DD/YYYY)
Purchase/sale price	$__________________________
Gas	$__________________________
Insurance	$__________________________
Repairs maintenance	$__________________________
Interest on auto loan	$__________________________
Leasing payments	$__________________________
Is your business registered for GST?	YES ☐ NO ☐ IF YES, your GST number? ____________________
Is GST included in the above amounts?	YES ☐ NO ☐

* While you do not need to send us your individual expense receipts, please note that Canada Revenue Agency may ask to see these at some point after your tax return has been filed. Acceptable receipts must be issued by the vendor (not a credit card statement) and should include the date, vendor name, and amount paid. CRA also requires that automobile expense claims be supported by a mileage log.

APPENDIX C: EMPLOYMENT EXPENSES *

(Please attach a signed T2200-*Declaration of Employment conditions* from your employer)

Travel	$____________________________
Parking	$____________________________
Office supplies	$____________________________
Telephone	$____________________________
Office rent	$____________________________
Vehicle expenses (if applicable):	
Year, make, and model	____
Purchase/sale price	$____________________________
Date of purchase/sale	________________ (MM/DD/YYYY)
If leased, Date Lease began?	________________ (MM/DD/YYYY)
KM driven for business *	________________ KMs
Total KM driven during year *	________________ KMs
Fuel	$____________________________
Repairs & Maintenance	$____________________________
Insurance	$____________________________
Licensing & Registration Fees	$____________________________
Loan Interest	$____________________________
Lease payments	$____________________________
Car Washes	$____________________________
Parking	$____________________________
Other:	$____________________________
COMMISSION EMPLOYEES ONLY	
Accounting and legal fees	$____________________________
Advertising and promotion	$____________________________
Meals and entertainment	$____________________________
Rental of office equipment	$____________________________
Training	$____________________________

* While you do not need to send us your individual expense receipts, please note that Canada Revenue Agency may ask to see these at some point after your tax return has been filed. Acceptable receipts must be issued by the vendor (not a credit card statement) and should include the date, vendor name, and amount paid. CRA also requires that automobile expense claims be supported by a mileage log.

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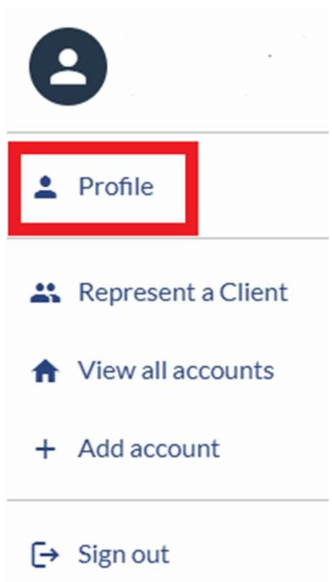
Providing Consent to Lohn Caulder LLP to act as an authorized representative with CRA

The CRA has announced that starting July 15, 2025, the Authorize a Representative service for individuals will no longer be available for individuals through the EFILE software.

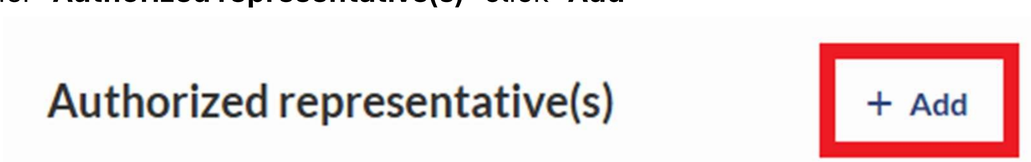
Authorize Lohn Caulder as my representative

To authorize Lohn Caulder as your representative, please log in to your CRA "My Account" and then complete the following steps:

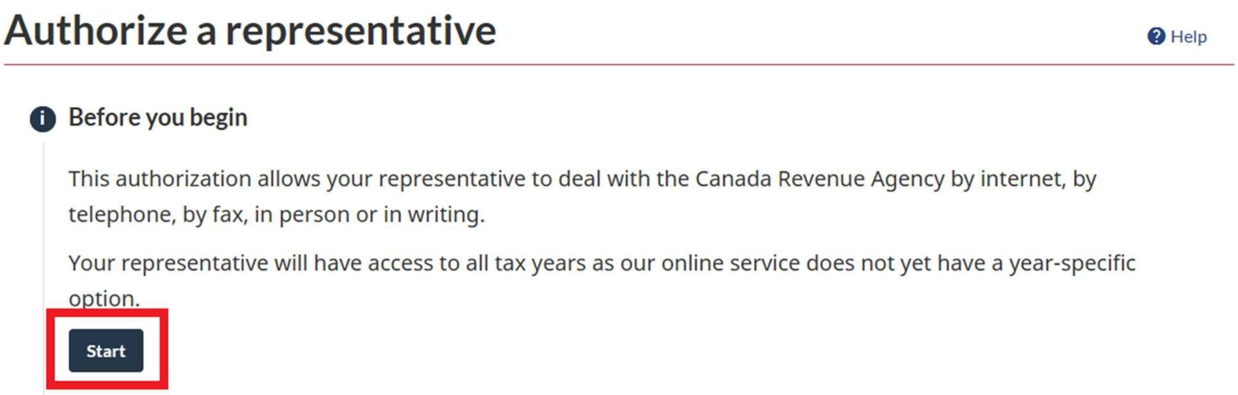
1. Click "**Profile**".



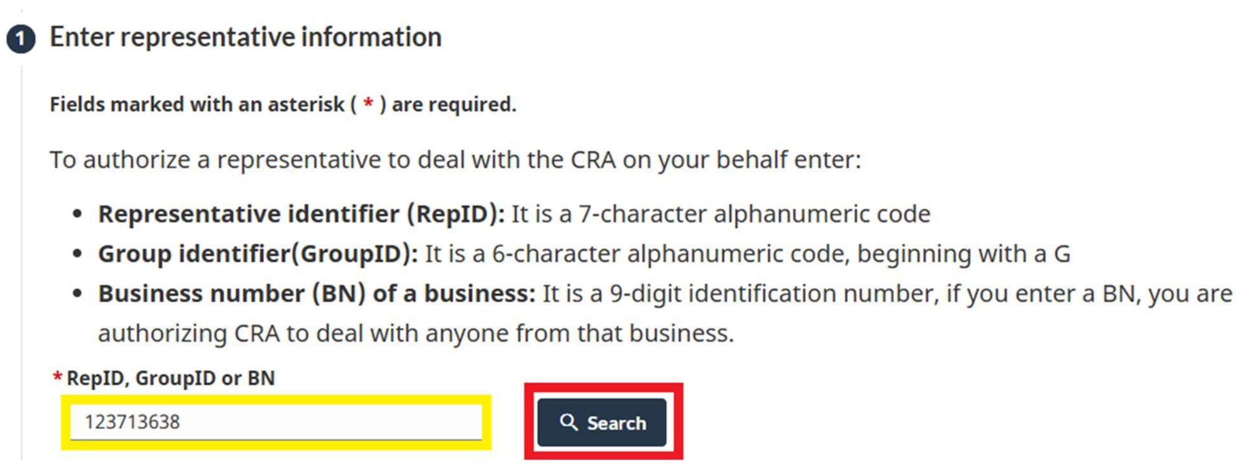
2. Under "**Authorized representative(s)**" click "**Add**"



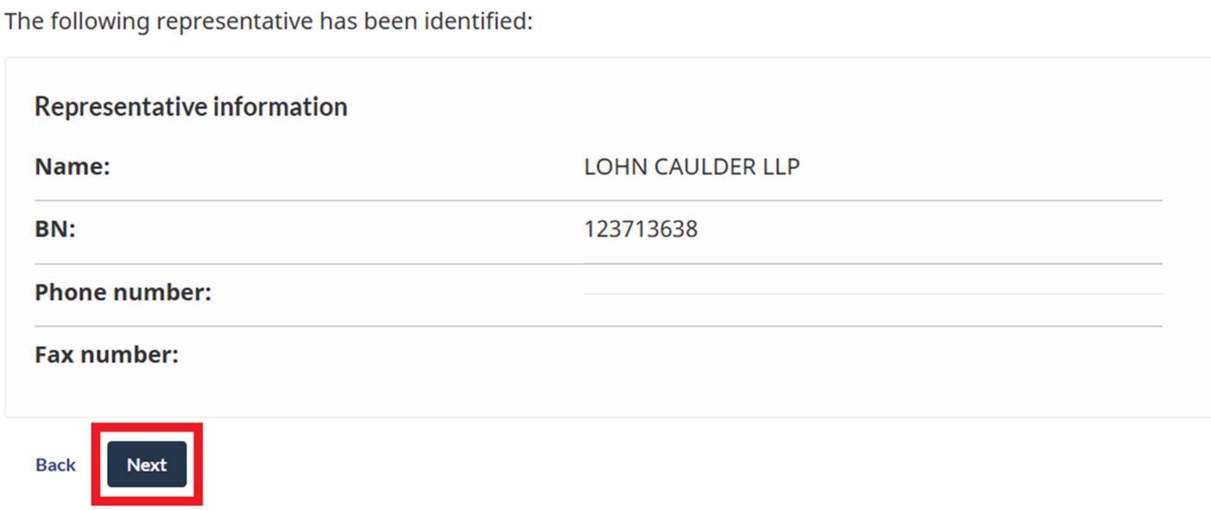
3. Click “**Start**” to begin



4. Enter in the Lohn Caulder LLP business number (**123713638**) and click “**Search**”



5. Review the "**Name**" and "**BN**" to ensure it matches our information and click "**Next**"



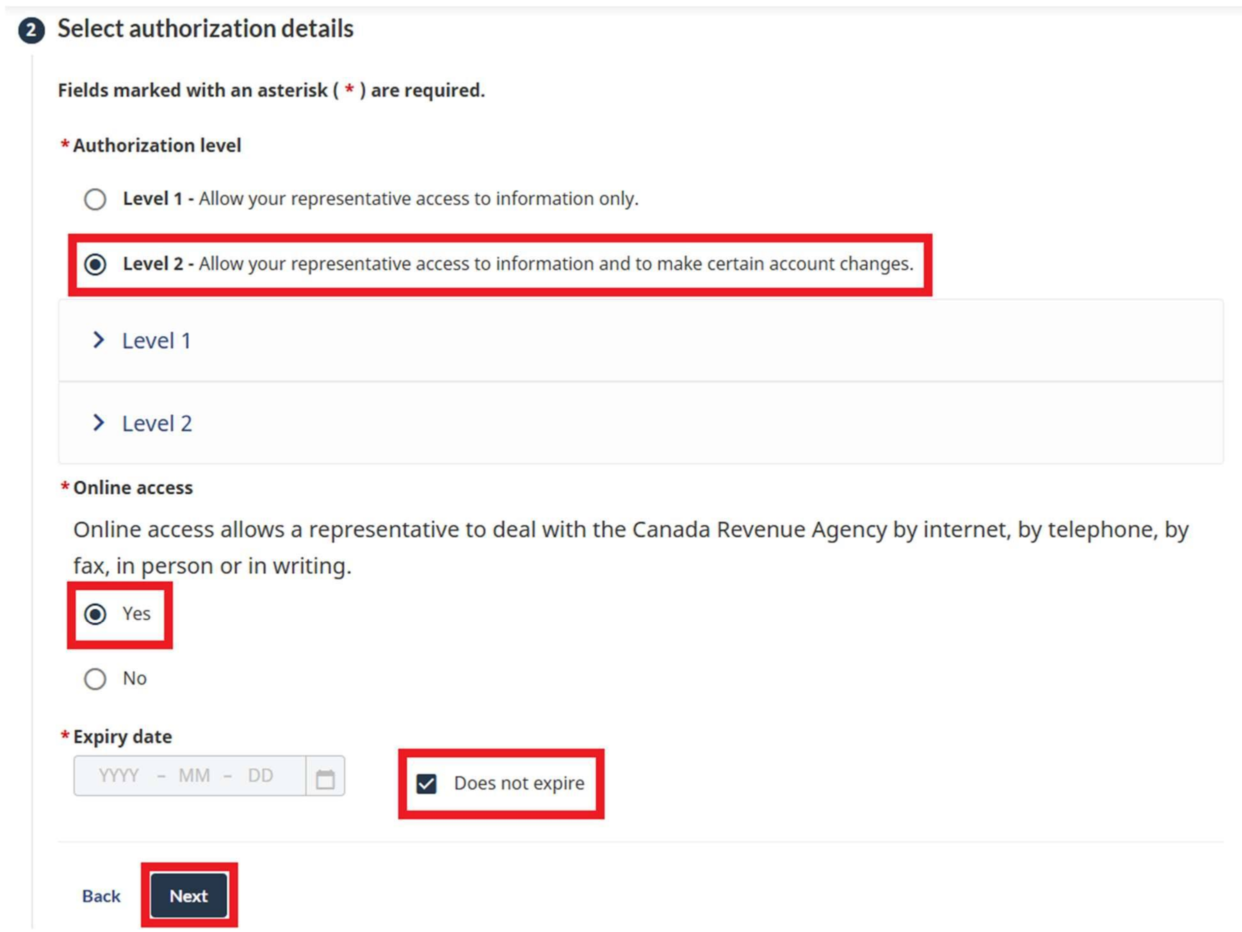
The following representative has been identified:

Representative information

Name:	LOHN CAULDER LLP
BN:	123713638
Phone number:	
Fax number:	

Back Next

6. Select the "**Level 2 – Allow your representative access to information and to make certain account changes**", select "**Yes**", check "**Does not expire**". Click "**Next**"



2 Select authorization details

Fields marked with an asterisk (*) are required.

* Authorization level

Level 1 - Allow your representative access to information only.

Level 2 - Allow your representative access to information and to make certain account changes.

Level 1

Level 2

* Online access

Online access allows a representative to deal with the Canada Revenue Agency by internet, by telephone, by fax, in person or in writing.

Yes

No

* Expiry date

YYYY - MM - DD

Does not expire

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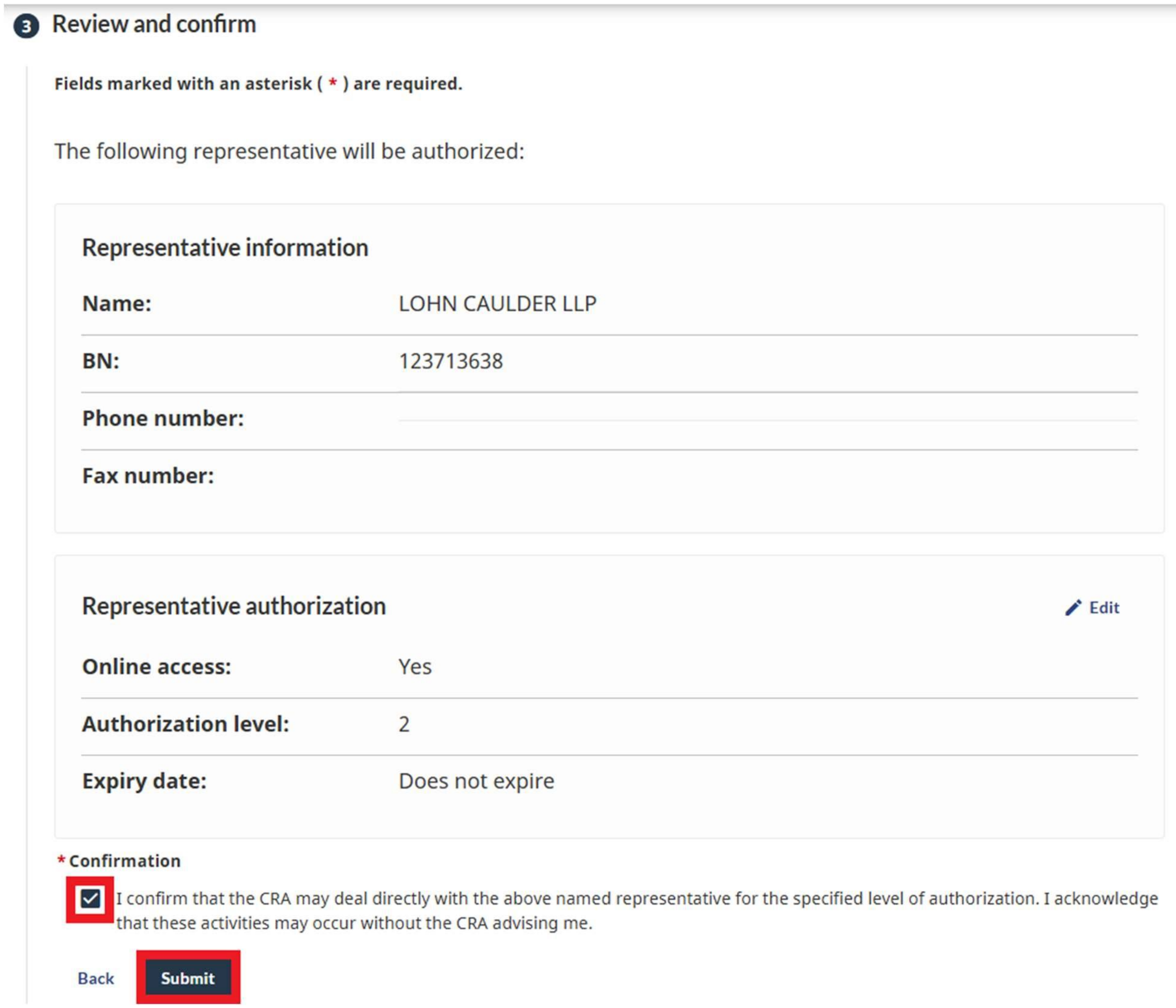
7. Review the selections and check "**Confirmation**". Then click "**Submit**"



3 Review and confirm

Fields marked with an asterisk (*) are required.

The following representative will be authorized:

Representative information

Name:	LOHN CAULDER LLP
BN:	123713638
Phone number:	
Fax number:	

Representative authorization

Edit

Online access:	Yes
Authorization level:	2
Expiry date:	Does not expire

* **Confirmation**

I confirm that the CRA may deal directly with the above named representative for the specified level of authorization. I acknowledge that these activities may occur without the CRA advising me.

Back Submit