



### Personal Tax Preparation Checklist

As a valued client, we look forward to working with you for the upcoming tax season. Below is some important information to assist you with some questions you may have. Should you require information not outlined below or are unable to access our website to obtain summary forms mentioned, contact reception at 780-482-3431 ext 0.

- the deadline for purchasing RRSPs to claim on your 2025 tax return is March 2, 2026
- the deadline for filing personal tax returns is April 30 (June 15 if self-employed). **Send us your complete information ASAP** via drop off, mail, courier, or upload to our secure Client CaseWare Cloud Portal which can be accessed through our website
- **CRA's My Account** – If you have not already done so, we strongly encourage registering for this service through CRA's website at <https://www.canada.ca/en/revenue-agency/services/e-services/digital-services-individuals/account-individuals/about-account.html>
- inform us of any changes to your personal identification (address, phone, email, marital status, dependants)
- if you sold your principal residence in 2025, provide property address, year purchased, amount of sale.
- if you disposed of any investments or capital assets in 2025, provide the original cost, year of purchase, amount of sale. Also, if you have received an investment account tax package from your financial institution, include it with your tax information
- if your return contains a rental, business or farm statement, we require the information in summary form. Summary forms are available on our website under Personal Forms and Checklists
- employment expenses **can only be claimed if you have provided us with a completed and signed Form T2200 from your employer**. Expenses are to be in summary form
- all claims for deductions of RRSP, union dues, childcare, tuition, medical, charitable donations, etc. must be supported with proper and complete official receipts
- medical expenses can only be claimed if the total medical expense exceeds 3% of your net income or \$2,834. If you have numerous receipts from the same facility, please obtain a detailed printout for the year from that facility. Medical or dental insurance premiums paid by you are also deductible. This includes Blue Cross and travel insurance for which you have receipts
- if you hold foreign property of more than \$100,000 CDN, you are required to file form T1135, Foreign Income Verification. There are substantial penalties for failure to do so. **There is an additional charge for filing this form.**

**Review your return** – the responsibility for your tax return lies with you so please review your return and notify us immediately of any errors or omissions. **If a T1 adjustment is required due to information not supplied to us or incorrect information supplied to us, an additional charge will apply.**

**CRA Review Requests** – **an additional charge will apply** if your return has been selected for review by CRA and you request that we respond to CRA on your behalf.

From our family to yours, we wish you all the best in 2026.

**The Team at Seniuk and Marcato, CPAs**