

Tax Return Form 2025

Note: If TH Financial Consulting has not prepared your return previously, please attach a full copy of your previous year's tax return and any other relevant information from previous years.

- If you own a rental property, please refer to our Rental Property Schedule.
- If you are self-employed, please refer to our T2125 worksheet.

PERSONAL DETAILS	
Name:	Occupation:
Phone No:	Mobile:
SIN:	Date of Birth (MM/DD/YYYY):
Email Address:	
Home Address:	
Postal Address:	
Full Name of Spouse:	Spouses Date of Birth (MM/DD/YYYY):
Date of Marriage/De facto (if started in 2025):	Spouse Taxable Income 2025:
<i>If TH Financial Consulting is not preparing your partner's tax return, please provide us with their taxable income as their income may be required to be recorded in your tax return.</i>	

DEPENDENTS		
Name	Birthday	SIN

ABOUT YOUR RESIDENCE	
In which province or territory did you live on December 31, 2025?	
If your province or territory of residence changed in 2025, enter the date of your move: _____	<input type="checkbox"/> Yes <input type="checkbox"/> No
Is your home address the same as your mailing address?	<input type="checkbox"/> Yes <input type="checkbox"/> No
In which province or territory do you currently live?	
Did you reside within Nisga'a Lands on December 31, 2025?	<input type="checkbox"/> Yes <input type="checkbox"/> No

GENERAL QUESTIONS

Are you filing an income tax return with the CRA for the first time?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Enter the date of your move: _____	
2025 income before you arrive in Canada converted in Canadian Dollars: _____	
Are you a Canadian citizen?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are you a person registered under the <i>Indian Act</i> ?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Did you own or hold specified foreign property where the total cost of all such property, at any time in the year, was more than CAN\$100,000 in 2025?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Did you dispose of your principal residence in 2025?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Did you flip a property in 2025?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Did you open a First Home Savings Account (FHSA) in 2025?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Were you confined to prison for a period of 90 days or more in 2025?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Did you occupy a rental unit in BC for at least 6 months? Please attach lease agreement.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Did you hold property (e.g., home, investment account, bank account) in trust for someone else, or as a joint owner only for convenience?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you own residential property that may require Underused Housing Tax reporting (e.g., non-resident ownership, corporate ownership, trusts)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Were you incarcerated for 90 days or more in 2025?	<input type="checkbox"/> Yes <input type="checkbox"/> No

INCOME DETAILS

1. T4 slips (including all employment, pensions)

How many Payment Summaries / Income Statements do you have for 2025 financial year? _____

2. Other Salary Income (includes any directors' fees, commissions, tips, etc.)

3. Interest (money received in your bank accounts)

Name of Bank	Account No.	Total Interest Received	Tax Withholding	Joint Account?
				<input type="checkbox"/> Yes <input type="checkbox"/> No
				<input type="checkbox"/> Yes <input type="checkbox"/> No

4. Dividends

Did you receive dividends during the 2025/2025 financial year?

☐ Yes ☐ No

Please provide copies of dividend statements of income received / T5 slips

5. Trusts Distributions and Partnership Income (i.e. examples of trusts are public funds or unlisted/family trusts). Name of trust or partnership – Please provide documents including yearend Tax Statements to show income from the funds you list.

6. Capital Gain

- Did you dispose of any investments/real estate in 2025?

☐ Yes ☐ No

- Do you expect your total capital gains for 2025 to exceed \$250,000?

☐ Yes ☐ No

- If you sold property or investments, briefly describe (type, dates, approximate amounts).

☐ Yes ☐ No

7. Rental Income – Please attach details of the rent received and all expenses in their separate categories. A Rental Property Schedule is available for your convenience. Please supply settlement sheets and purchase documents for properties if applicable.

8. Any Other Income including cryptocurrency - Any other income you received in the financial year which doesn't fit into any of the above categories - please provide details.

9. Foreign Income

- Did you receive foreign income/salary? – please attach all relevant documentation. Did you receive any Foreign Dividends? If yes, please provide statements.

10. Trusts Distributions and Partnership Income (i.e. examples of trusts are public funds or unlisted/family trusts). Name of trust or partnership – Please provide documents including yearend Tax Statements to show income from the funds you list.

11. Capital Gain

- Did you dispose of any investments/real estate in 2025?

☐ Yes ☐ No

- Do you expect your total capital gains for 2025 to exceed \$250,000?

☐ Yes ☐ No

- If you sold property or investments, briefly describe (type, dates, approximate amounts).

☐ Yes ☐ No

12. Rental Income – Please attach details of the rent received and all expenses in their separate categories. A Rental Property Schedule is available for your convenience. Please supply settlement sheets and purchase documents for properties if applicable.
13. Any Other Income including cryptocurrency - Any other income you received in the financial year which doesn't fit into any of the above categories - please provide details.
14. Foreign Income
 - Did you receive foreign income/salary? – please attach all relevant documentation. Did you receive any Foreign Dividends? If yes, please provide statements.

Please ensure you can substantiate all claims.

- Ensure you have all expense receipts.
Please provide details of all expenses you incurred over the financial year under the following categories:

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DEDUCTION DETAILS

2. Donations

☐ Yes ☐ No

Name of Body	Amount

3. Tax Agent Fees (from previous year, 2025 FY): _____

4. Interest & Dividend Deductions

Description	Amount
Interest in dividends or other investment income	
Cost of investment advisor	
Reference Materials	
Other – please specify:	

5. Other Work-Related Deductions – please provide details and ensure you have kept all receipts and diary records.

Description	Amount
Diary, stationery, work materials	
Union Fees / Professional Body Memberships	
Mobile phone (total cost per month _____ x work-related % _____)	
Tools and equipment (costing \$300 or less, only)	
Tools and equipment (costing more than \$300) Please attach all documents/receipts so we can depreciate.	
Seminars & short courses	
Income protection insurance (note: life insurance is not tax-deductible)	
Subscriptions	
Other – please specify:	

6. Home Office & Working from **Home Expenses**

Total Home Square Ft: _____

Home Office Use Square Ft: _____

Business Use of Home Expenses	Amount
Heat	
Electricity	
Insurance	
Maintenance	
Mortgage Interest	
Property Taxes	
Other Expenses (specify)	

Please list any computer equipment or office furniture purchased during the year Jan 1 – Dec 31, 2025,
and/or supply receipts:

Description	Date of Purchase	Cost	Work-related %

7. Work Related Travel Expenses

7a. Please detail local travel for work purposes i.e. taxis, public transport, tolls and parking, and car hire fees.

7b. International / interstate / interstate trips for work purposes i.e. airfares, accommodation, meals and incidentals, taxi fares, visa application fees. *Please note:* You must keep a travel logbook for trips of 6 or more consecutive nights.

7c. Other (Any costs that were directly related to your job – please provide details)

8. Self-education Expenses include seminar costs, textbooks, stationery, student union fees, course fees and depreciable items used for self-education purposes e.g. Computer, Reference Library

Please advise the connection between your course/ studies and your current employment

9. Please provide medical receipts and per dependents

Date	Patient Name	Description	Amount

10. RRSP Contributions

☐ Yes ☐ No

If yes, please provide us with an RRSP contribution slip.

11. Child support that you paid from Jan 1 – Dec 31, 2025? \$_____
- Please provide official receipt from Childcare provider.

I hereby confirm that above is complete and accurate.

Client Name: _____

Signature: _____

Thank you for completing our checklist. We will prepare your tax return based on the information you have provided to us. Upon receiving your information, we will contact you to discuss your tax return and to seek further information if necessary.