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G-Tax - Assessoria e consultoria fiscal para brasileiros no Canada



# 2025 Income Tax Organizer

Please complete all applicable sections and provide supporting documents where indicated.

## T-Slips

- T3 Trust Income
- T4 Employment Income
- T4A Pension / Other Income
- T4A(OAS) Old Age Security
- T4A(P) CPP Benefits
- T4E Employment Insurance
- T4RIF RRIF Income
- T4RSP RRSP Income
- T5 Investment Income
- T5007 Benefits
- T5008 Investment Transactions
- T5013 Partnership Income
- T2200 Employment Conditions
- T2201 Disability Certificate
- T2202 Tuition
- Relevé Slips (QC if applicable)

## Receipts & Supporting Documents

- RRSP/FHSA contribution receipt
- Union / professional dues
- Medical & dental expenses
- Charitable donations
- Political donations
- Childcare receipts
- Student loan interest
- Tax installment payments
- Moving expenses
- Rent receipts
- Void cheque for direct deposit

**This form works best when completed on a computer.**

## 1. PRIMARY FILER INFORMATION

Full Name: \_\_\_\_\_

SIN: \_\_\_\_\_

Date of Birth (DD-MM-YYYY): \_\_\_\_\_

Gender: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

CRA Online Mail Registration:  Yes  No  Already Registered

Current Home Address: \_\_\_\_\_

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Did you move in 2025 due to work reasons?  Yes  No

If YES — Previous Address: \_\_\_\_\_

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If yes for work reasons, was the move at least 40 km closer to your new workplace?  Yes  No

If YES — please provide all moving expense receipts.

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## 2. SPOUSE / PARTNER INFORMATION

Full Name: \_\_\_\_\_

SIN: \_\_\_\_\_

Date of Birth (DD-MM-YYYY): \_\_\_\_\_

Gender: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

CRA Online Mail Registration:  Yes  No  Already Registered

Current Marital Status:

Married

Living Common-Law

Widowed

Divorced

Separated

Single

Did your marital status change in 2025?  Yes  No

If YES — Date of Change (DD-MM-YYYY): \_\_\_\_\_

New Status: \_\_\_\_\_

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### 3. DEPENDENTS

Complete one section per dependent.

Name: \_\_\_\_\_

SIN: \_\_\_\_\_

Date of Birth (DD-MM-YYYY): \_\_\_\_\_

Net Income: \_\_\_\_\_

Tuition Paid?  Yes  No

If YES — transferring tuition credit to parent?  Yes  No

Childcare Expenses?  Yes  No

If YES — attach receipts.

Lived with you all year?  Yes  No

Eligible for Disability Amount?  Yes  No

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Name: \_\_\_\_\_

SIN: \_\_\_\_\_

Date of Birth (DD-MM-YYYY): \_\_\_\_\_

Net Income: \_\_\_\_\_

Tuition Paid?  Yes  No

If YES — transferring tuition credit to parent?  Yes  No

Childcare Expenses?  Yes  No

If YES — attach receipts.

Lived with you all year?  Yes  No

Eligible for Disability Amount?  Yes  No

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**4. REQUIRED FOR CLIENTS WHO HAVE PREVIOUSLY FILED THEIR INCOME TAX.  
(NOT REQUIRED FOR FIRST-TIME TAX FILERS).**

Previous year Notice of Assessment and/or Reassessment

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**5. GENERAL INFORMATION**

Please answer YES or NO unless otherwise indicated.

Canadian Citizen?  Yes  No

Authorize CRA to share basic information with Elections Canada?

Yes  No (*Required for e-filing*)

New to Canada in 2025?  Yes  No

If YES — arrival date: \_\_\_\_\_

Paid rent in 2025?  Yes  No

If YES — total rent paid: \$ \_\_\_\_\_

Paid tuition in 2025?  Yes  No

If YES — provide T2202.

Foreign assets over \$100,000 CAD?  Yes  No

If YES — provide statements (T1135 required).

First-time home buyer in 2025?  Yes  No

Disability Tax Credit claim?  Yes  No

First-time claim?  Yes  No

Employment change in 2025?  Yes  No

All T4s received?  Yes  No

Contributed to RRSP?  Yes  No

2025 RRSP Deduction Limit (from 2024 NOA): \$ \_\_\_\_\_

Spousal RRSP contribution?  Yes  No

Contributed to FHSA?  Yes  No

2025 FHSA Deduction Limit (from 2024 NOA): \$ \_\_\_\_\_

Spousal FHSA contribution?  Yes  No

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## 6. HOME OFFICE EXPENSES (IF APPLICABLE)

Received T2200 (Conditions of Employment)?  Yes  No

If YES — complete Home Office section below.

Total home square footage: \_\_\_\_\_

Office square footage: \_\_\_\_\_

Expense	Amount \$
Gas	
Electricity	
Insurance	
Repairs / Maintenance	
Mortgage Interest	
Property Taxes	
Rent	
Other	
Other	

**I confirm the information provided is complete and accurate to the best of my knowledge.**

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_