

2025 T1 PERSONAL INCOME TAX CLIENT INTAKE FORM

This questionnaire is designed to assist you in compiling the information necessary to prepare your income tax return. Please return this form with your documentation.

Client Name _____ DOB _____ SIN _____

Phone _____ Email _____

Do you want to receive Email notifications from the CRA? Already Registered ☐ Yes ☐ No ☐

Have you set up direct deposit with the CRA? Yes ☐ No ☐

Mailing Address _____

Home Address: (if different) _____

Elections Canada

1. Are you a Canadian citizen? YES ☐ NO ☐
2. Answer the following question only if you are a Canadian citizen:
As a Canadian citizen, do you authorize the CRA to provide your name, address, date of birth, and citizenship to Elections Canada to update your information on the National Register of Electors or are you aged 14 to 17, to update the Register of Future Electors? YES ☐ NO ☐
3. Do you authorize the CRA to provide their name, mailing address and email address to BC Transplant so that BC Transplant may contact the taxpayer or send them information about organ and tissue donation? YES ☐ NO ☐

Marital Status / Family Profile

☐ Married ☐ Widowed ☐ Divorced ☐ Separated ☐ Single ☐ Common Law

Spouse's Name (if applicable) _____

4. Did your marital status change in 2025? YES ☐ NO ☐
(If yes indicate change and date) _____

Full name	Relationship	D.O.B (MM,DD,YY)	SIN	Same address	Net Income
				Yes ☐ No ☐	
				Yes ☐ No ☐	
				Yes ☐ No ☐	

Family Profile for where the parents are separated or family situation is different to common-law or married.

5. Do you have shared custody of dependents? YES ☐ NO ☐ If yes please provide details of arrangement

6. Is there a child support arrangement in place? Pay ☐ Receive ☐

7. Name of child as eligible dependent: _____

Abacus Chartered Professional Accountant Inc.

Please check items that apply, and provide documents as needed:



OTHER INCOME

- ☐ Alimony received, If yes how much money _____
- ☐ Tips, if yes how much money _____
- ☐ Other Income (e.g. stock options, annuities, scholarships, bursaries, research grants) _____
- ☐ **Business or Professional** – Summary of income and expenses
(T2125: Statement of Business or Professional Activities must be completed, or information provided)
 - ☐ **GST Filing** for small business. Please provide access code _____ or give us access through your CRA business account. ☐
- ☐ **Rental Property Income**- attach details of purchases and sales.
Address of rental(s) _____
(T776 Statement of Real Estate Rentals must be completed, or information provided)
- ☐ **Capital Gains/Losses** - Did you dispose of any capital properties this year? Please provide your gain/ loss summary for stock transactions. Attach copies of sales details and original purchase documentation.

DEDUCTIONS/CREDITS

- ☐ Registered Retirement Savings Plan contributions (attach receipts)
Rest of Year \$ _____ and First 60 days \$ _____
- ☐ Registered Retirement Savings Plan withdrawals under the Home Buyer Plan or the Lifelong Learning Plan
- ☐ Annual union, professional dues (attach receipts) not included on T4's
- ☐ Childcare expense (attach receipts) (a) for individual providers, include S.I.N. and address (b) for summer camps, indicate number of weeks that were in-residence \$ _____
- ☐ Allowable business investment losses (refer to Capital Gains/Losses above)
- ☐ Home office expenses – provide signed Form T2200 – Declaration of Conditions of Employment
- ☐ Commission and employment expenses (include details and T2200 or TL2) Note: Include cost of tools.
- ☐ Moving expenses (attach receipts). Did you move 40km closer to a new work location?
- ☐ Alimony or separation allowances paid (include name(s) and address(es) of recipient(s); attach copy of agreement or court order for spousal support
- ☐ Carrying charges (interest on money borrowed to earn dividends and interest, investment counsel fees)
- ☐ Federal and provincial political contributions (attach receipts) Or provide total amount \$ _____
- ☐ Charitable donations (attach receipts). Or provide total amount \$ _____
- ☐ Medical expenses (attach receipts) and details of private health insurance premiums, including amounts paid while traveling (NOTE: Your pharmacy can provide an annual a summary of all prescriptions for your family)
- ☐ Tuition fees (attach T2202/T2202A including amounts that can be transferred from dependants) Note: These can be obtained online from most universities and colleges.
- ☐ Fees paid to an educational institution, professional association, provincial ministry or other similar institution to take an exam required to obtain professional status or be licensed to practice.
- ☐ Interest paid on student loans under Canada Student Loan Program \$ _____
- ☐ Home Accessibility Tax Credit- age 65 qualify for the disability tax credit and remodeled your home.
- ☐ Educator school supplies Tax Credit- provide receipts up to \$1,000 and certification from school authority.
- ☐ Red Seal completion grants for Tradespeople

These questions are on the personal income tax form. Please answer on behalf of each member of your family:

1. Do you have a Disability Tax Credit on file with the CRA? **YES** ☐ **NO** ☐
(If yes and this is your first year claiming the DTC? Please provide Form T2201)
2. Did you dispose of a principal residence in the current taxation year for which you will claim the total or partial primary residence exemption? **YES** ☐ **NO** ☐ **If yes, we need the Statement of Adjustments and the original purchase price and date and amount.**
3. Did the taxpayer stop living in the principal residence to rent it or did the taxpayer stop renting the residence to live in it during the current taxation year. **YES** ☐ **NO** ☐
4. Are you a first-time home buyer? **YES** ☐ **NO** ☐

Residency

5. Province or territory of residence on December 31, 2025: _____
6. If you are not a Canadian resident, please provide details of residency: _____

Spouse's income – complete this section if you are not filling your taxes together

7. Spouses: Name/ DOB/SIN: _____
8. If you are **not filling** with your spouse please provide their 2025 net income: _____
9. Does your spouse live at the same address? **Yes** ☐ **No** ☐

EFILE

10. Is this your first time filing Taxes? **YES** ☐ **NO** ☐
11. Do you have the same name as your last T1? **YES** ☐ **NO** ☐
12. Do you have a TFSA? **YES** ☐ **NO** ☐
13. Do you have a FHSA? **YES** ☐ **NO** ☐
14. Are you an US citizen? **YES** ☐ **NO** ☐

Canada Workers credit

15. Were you confined to a prison or similar institution for a period of 90 days or more in 2025? **YES** ☐ **NO** ☐
16. Were you an officer or servant of another country, such as a diplomat, or was a family member or an employee of an officer or servant of another country and have no income tax payable for the taxation year? **YES** ☐ **NO** ☐

Foreign Income

17. Did you own or hold foreign property at any time in 2025 with a total cost of more than CAN \$100,000? **YES** ☐ **NO** ☐
(Foreign property includes stocks, bonds, income-producing real estate; it does not include personal use properties or foreign investments held through Canadian mutual funds)

18. Did you earn any income or realize any gains from foreign property in 2025?

YES ☐ NO ☐

If yes, please provide legal address, proceeds and year of acquisition: _____

19. Did you earn foreign employment income in 2025? YES ☐ NO ☐

Renters Tax Credit (for tenants) – If you rented in BC for at least 6 months.

20. By signing my return, I declare the following information about my rentals in British Columbia during 2025:

Rental address: _____

Number of months of tenancy at this address: _____

Name of landlord or company payment was made to: _____

Enter the total rent paid for the unit for the year: _____

Extra information - Please include any additional information or comments below of any special circumstances:

Signature: _____ Date: _____

Please Print Name: _____