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March 2, 2026

Mr Firstname Lastname
Burlington ON

Dear Mr. Lastname,

Via Email

It will soon be time to prepare your 2025 tax return. Providing complete and accurate information will allow us to prepare your tax return in a timely manner. Please review the attached questionnaire, note any changes and indicate which items you are supplying.

Mandatory electronic filing

The Canada Revenue Agency (CRA) requires approved tax preparers to file tax returns electronically. Your tax return will be transmitted to the CRA.

Reporting the sale of your principal residence

All taxpayers who sell their home must report the sale on their tax return, even if it was their principal residence for the whole time they owned it. There are substantial penalties for not reporting the sale. If you sold your home in 2025, provide the details on the attached questionnaire.

If you have any questions, please phone us at (289) 427-5285 or email us at admin@paulvet.cpa.

Sincerely,



Paul Vet
Paul Vet CPA PC

2025 Tax Information Checklist

If there are any changes, please note them and return form us. If no changes, not required

Contact Information

Legal name: Firstname Lastname _____
Preferred name: _____
Address: Burlington ON _____
Mobile: _____
Home: _____
Work: _____
Email: _____

Family Details

Marital status: Single _____

Dependants

Name, date of birth and SIN of any dependants: _____

Did you receive or make spousal or child support payments during the year? Yes No

CRA Questions

Are you a Canadian Citizen? Yes No

Do you agree to Canada Revenue Agency providing your name, address, and date of birth to Elections Canada for the National Register of Electors? Yes No

Do you have income that is exempt under the Indian Act? Yes No

Do you authorize the CRA to give your name and email address to Ontario Health regarding organ and tissue donation? Yes No

Sale or Disposition of a Principal Residence or Other Real Property

Did you sell of your principal residence this year? Yes No

Did you sell any other real property (cottage, vacation home, vacant land, etc.)? Yes No

Complete address of the property sold, including postal code (attach additional page, if required):

Year purchased: _____ Sale price: _____

Foreign Pensions

Did you receive a pension from a country other than Canada? Yes No

If yes, provide the following details for each pension received (attach additional pages, if required)

Country: _____ Amount: _____ Exempt portion: _____
Currency: _____ Start date: _____ Foreign tax paid: _____

2025 Supporting Documentation

Please note any updates and return this form to:
Paul Vet CPA PC, 1 - 2440 Industrial Street, Burlington, ON L7P1A5 or admin@paulvet.cpa

For Firstname Lastname 2025 T1

Notices

- Notice(s) of (re)assessment for 2024

Other Income or New Sources of Income

- First year for CPP, OAS?
- T4E for employment insurance payments
- Spousal or child support RECEIVED
- Rental property revenue and expenses
- Business, self-employed income and expenses
- Details of foreign income or other pensions received (see previous page)

Receipts (please include receipts, organized by type below, without staples please (use paper clips))

- RRSP contributions and withdrawals
- Union or professional dues
- Donations
- Medical expenses, including plan premiums
- Child care
- Student loan interest
- T2202 tuition fees
- Moving expenses
- Digital news subscriptions
- T2200 Employment expenses
- Investment expenses (interest, management fees)
- Spousal or child support PAID
- Rent or property tax
- Public or non-profit long-term care
- Home energy costs on a reserve

Slips From the Following Issuers (if applicable to 2025)