

2025 TAX INFORMATION

25

NEW CLIENT YES NO

STEP 1

Select how you would like to process your return
If no option is selected, we will process with option A

All applicable documents are scanned and available in our secure portal.

A • DROP OFF IN PERSON
• SIGN & PAY IN PERSON
• PICK UP ORIGINALS

PRINTED RETURN REQUEST YES NO

B • DROP OFF
IN PERSON/MAIL/EMAIL/PORTAL
• DOCSIGN (EMAIL REQUIRED)
• PAY WITH E-TRANSFER/CREDIT CARD
• NO ORIGINALS RETURNED

STEP 2

Review your information and correct as needed
Complete remaining fields

TAXPAYER – PRIMARY CONTACT

If new client

LAST NAME	FIRST NAME	D.O.B. MM/DD/YYYY	S.I.N.

STREET	CITY	PROVINCE	POSTAL CODE

PHONE	EMAIL

DISABILITY TAX CREDIT *NEW* CURRENTLY? YES <input type="checkbox"/> NO <input type="checkbox"/>	CANADIAN CITIZEN? YES <input type="checkbox"/> NO <input type="checkbox"/>	SHARE INFO WITH ELECTIONS CANADA? YES <input type="checkbox"/> NO <input type="checkbox"/>
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MARITAL STATUS As of December 31, 2025

SINGLE <input type="checkbox"/>	SEPARATED <input type="checkbox"/>	COMMON-LAW <input type="checkbox"/>	<i>If you selected common-law or married, enter your spouse or partner's details below</i>
DIVORCED <input type="checkbox"/>	WIDOWED <input type="checkbox"/>	MARRIED <input type="checkbox"/>	

SPOUSE/PARTNER

*If new client
If marital status changed as of December 31, 2025*

LAST NAME	FIRST NAME	D.O.B. MM/DD/YYYY	S.I.N.

DISABILITY TAX CREDIT *NEW* CURRENTLY? YES <input type="checkbox"/> NO <input type="checkbox"/>	CANADIAN CITIZEN? YES <input type="checkbox"/> NO <input type="checkbox"/>	SHARE INFO WITH ELECTIONS CANADA? YES <input type="checkbox"/> NO <input type="checkbox"/>
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BRIAN PETERSEN
MBA, CPA, CMA, CFP
TAX SERVICES YOU CAN TRUST



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905.648.8656 | office@bptax.ca | www.bptax.ca

DEPENDANTS List dependants where tax returns are required

List new dependants as of 2025

If new client or new dependant in 2025

LAST NAME	FIRST NAME	D.O.B. MM/DD/YYYY	S.I.N.

DISABILITY TAX CREDIT CURRENTLY? YES <input type="checkbox"/> NO <input type="checkbox"/> *NEW*			TAX RETURN REQUIRED? YES <input type="checkbox"/> NO <input type="checkbox"/>

If new client or new dependant in 2025

LAST NAME	FIRST NAME	D.O.B. MM/DD/YYYY	S.I.N.

DISABILITY TAX CREDIT CURRENTLY? YES <input type="checkbox"/> NO <input type="checkbox"/> *NEW*			TAX RETURN REQUIRED? YES <input type="checkbox"/> NO <input type="checkbox"/>

If new client or new dependant in 2025

LAST NAME	FIRST NAME	D.O.B. MM/DD/YYYY	S.I.N.

DISABILITY TAX CREDIT CURRENTLY? YES <input type="checkbox"/> NO <input type="checkbox"/> *NEW*			TAX RETURN REQUIRED? YES <input type="checkbox"/> NO <input type="checkbox"/>

STEP 3

Complete and sign (submit documents, if required)

FOREIGN INVESTMENTS AND PROPERTY

NO, I DID NOT OWN FOREIGN INVESTMENTS OR FOREIGN PROPERTY OF MORE THAN \$100,000 CDN IN 2025

IF NO, SIGN BELOW

YES, I OWNED FOREIGN INVESTMENTS OR FOREIGN PROPERTY OF MORE THAN \$100,000 CDN IN 2025

IF YES, COMPLETE AND SIGN BELOW

FOREIGN INVESTMENTS – PLEASE PROVIDE THE **T1135** FOREIGN INCOME VERIFICATION STATEMENT PREPARED BY YOUR BROKER

FOREIGN PROPERTY – PLEASE PROVIDE YOUR PROPERTY DETAILS BELOW

FULL ADDRESS _____

PURCHASE PRICE \$ _____ YEAR OF PURCHASE _____

ALL CLIENTS ARE REQUIRED TO SIGN AND DATE THIS DECLARATION

SIGNATURE _____

DATE SIGNED MM/DD/YYYY

PRINT NAME _____

STEP 4

Complete and include with applicable worksheets
Worksheets available at www.bptax.ca

SUBMIT APPLICABLE FORMS: T4, T4E, T4A, CPP, OAS, T4RIF, T4RSP, T2202, T3, T5, T5008, T5013

TOTAL PROPERTY TAXES PAID

\$

TOTAL RENT PAID

\$

SUBMIT FINAL PROPERTY TAX ASSESSMENT

OR

SUBMIT RECEIPT FROM LANDLORD

TOTAL COMBINED MEDICAL EXPENSES PAID

\$

TOTAL COMBINED CHARITABLE

DONATIONS MADE

\$

PLEASE INCLUDE YEARLY STATEMENT

We no longer accept **individual** medical receipts

INCLUDE WORKSHEET & RECEIPTS

HAVE YOU SOLD YOUR PRINCIPAL RESIDENCE THIS YEAR? YES NO **IF YES, PLEASE PROVIDE**
YEAR PURCHASED

PROCEEDS OF DISPOSITION (SOLD FOR)

\$

EMPLOYMENT EXPENSES

ARE YOU CLAIMING HOME OFFICE EXPENSES AGAINST EMPLOYMENT INCOME? YES NO

IF YES, SUBMIT WORKSHEET FOR EMPLOYMENT EXPENSES (PLEASE DO NOT SUBMIT RECEIPTS)

RENTAL PROPERTIES

DO YOU OWN RENTAL PROPERTIES? YES NO

**IF YES, SUBMIT SEPARATE WORKSHEETS FOR EACH RENTAL PROPERTY
(PLEASE DO NOT SUBMIT RECEIPTS)**

SMALL BUSINESS

ARE YOU SELF-EMPLOYED **OR** DO YOU OWN A SMALL BUSINESS? YES NO

IF YES, SUBMIT SEPARATE WORKSHEETS FOR EACH BUSINESS (PLEASE DO NOT SUBMIT RECEIPTS)

ARE YOU REGISTERED FOR HST? YES NO **IF YES, SUBMIT A COPY WITH THE ACCESS CODE**

QUICK REFERENCE

PLEASE SUBMIT NO LATER THAN **FRIDAY, APRIL 17, 2026**

TAX FILES RECEIVED AFTER APRIL 17, 2026 WILL NOT BE FILED
BY THE APRIL 30, 2026 DEADLINE.

TAX DEADLINE

April 30, 2026

T SLIPS REQUIRED

INCLUDE APPLICABLE FORMS, IN THIS ORDER

- T4 EMPLOYMENT INCOME
- T4E EMPLOYMENT INSURANCE
- T4A OTHER INCOME
- T4AP CANADA PENSION PLAN INCOME
- T4A OLD AGE SECURITY
- T4RIF REGISTERED RETIREMENT INCOME FUND
- T4RSP REGISTERED RETIREMENT SAVINGS PLAN
- T2202 TUITION
- T3 TRUST INCOME
- T5 INVESTMENT INCOME
- T5008 CAPITAL GAINS/LOSSES
- T5013 LIMITED PARTNERSHIP INVESTMENT INCOME

WORKSHEETS

TOTAL RECEIPTS/STATEMENTS AND INCLUDE WITH THE FOLLOWING WORKSHEETS

- CHARITABLE DONATIONS
- MEDICAL EXPENSES
- PROPERTY TAX/RENT RECEIPTS
- CHILDCARE RECEIPTS
- SPOUSAL SUPPORT PAYMENTS
- CAREGIVER EXPENSES
- DIGITAL NEWS SUBSCRIPTIONS
- UNION & PROFESSIONAL DUES
- MOVING EXPENSES

TIPS FOR SUBMITTING RETURN

- ✓ USE PAPER CLIPS OR CLIPS
- ✓ REQUEST YEARLY STATEMENTS FROM YOUR PHARMACY, DENTIST, OPTOMETRIST, ETC. (SORT, CLIP & TOTAL)
- ✓ TOTAL ALL RECEIPTS WHERE REQUESTED
- ✓ USE ALL APPLICABLE WORKSHEETS
- ✓ SORT BY PRIMARY, PARTNER, DEPENDANTS
- ✓ SORT T SLIPS AS LISTED ABOVE
- ✓ CONSIDER SUBSCRIBING TO IFIRM PORTAL

PLEASE DO NOT

- ✗ SUBMIT INDIVIDUAL MEDICAL RECEIPTS
(A \$50 FEE MAY INCUR IF WE ARE REQUIRED
TO SORT AND TOTAL YOUR INDIVIDUAL RECEIPTS)
- ✗ USE STAPLES, POST IT NOTES, INCLUDE ENVELOPES
- ✗ SUBMIT IN BINDERS, HARD CASES, FOLDERS, ETC.
- ✗ SUBMIT PRIOR TAX RETURNS (UNLESS REQUESTED)
- ✗ INCLUDE MONTHLY UTILITY STATEMENTS
- ✗ INCLUDE ANY PROMOTIONAL/MARKETING PAGES
FROM INVESTMENT/BANKING STATEMENTS

EMPLOYMENT EXPENSE WORKSHEET

COMPLETE THIS IF YOU ARE EMPLOYED AND HAVE OBTAINED
A T2200 CONDITIONS OF EMPLOYMENT

Available at

www.bptax.ca

RENTAL PROPERTIES WORKSHEET

COMPLETE THIS PAGE FOR EACH RENTAL PROPERTY THAT YOU OWN

No receipts related to your business expenses need to be submitted at this time. **However**, you are responsible to keep your receipts for 6 years in the event CRA requests proof.

SMALL BUSINESS WORKSHEET

COMPLETE THIS PAGE IF YOU ARE SELF-EMPLOYED
OR OWN A SMALL BUSINESS