StrathdeePolley&Co.

Tax. Accounting. Advisory.

149 Welham Rd #16
Barrie ON L4N 8Y3
705-737-0983

INFORMATION SHEET

Name: _____

SIN: _____ Birth Date:_____(mm/dd/yyyy)

Phone: _____

Email: _____

Address:_____

City:_____Province: _____ Postal Code: _____

List any Dependants and their birthdates:

_____

_____

Marital Status on Dec 31: Married Common Law Separated Divorced Single Widowed

Please provide a copy of your latest Notice of Assessment.

CRA My Account (Circle One): Registered Not Registered

Last name changed in previous year: Y N To: _____

Canadian Citizen? Y N

Please check items that apply:

Marital Status Change: _____ Property Taxes: _____ Rent Receipts: _____ Tuition Fees: _____

Foreign Property over 100K CAD:_____ Medical Receipts: _____ Daycare Receipts: _____ RRSP Slips: ____

Did you open a FHSA account? If so, provide the date. _____

Did you purchase a new home or sell your home during the year? _____

Did you own a Rental Property? _____

Self Employed: Y N

Please use this list to gather your information and return with your submission. Please check what applies to you.

Form #	Income Source	Check if applicable
T4, T4A	Employment, Pension, Commissions, Fees for Service	
T4(OAS)	Old age security	
T4A (P)	Canada Pension Plan	
T4E	Employment Insurance	
T4RSP,T4RIF	RRSP or RRIF LIF income	
T3/T5s	Investment, Interest, Dividends, and Capital Gains etc.	
T5007	Social assistance, Worker's Compensation	
T5008	Statement of Securities Transactions	
T5013	Partnership income	
Sale of Home	You must declare the sale of your principal residence. We need year of purchase and purchase price, amount sold for, and date of sale. The sale of a principal residence is tax exempt, if it has been your principal residence for the duration of ownership.	
Sale of Property	Capital gains/losses from other property	
	Support payments received (taxable/non-taxable)	
	Rental Income and Expenses (Template Available upon request)	
Form #	**Deduction/Credits**	**Check if applicable**
T2202	Tuition fees & Student Loan Interest	
T2200	Employment Expenses - Home office & vehicle expenses (if employment requires you to work from home, or pay for certain expenses)	
	RRSP Contribution receipts (throughout 2025 and/or in the first 60 days of 2026). Receipts for contributions made in 2026 usually arrive mid to late March	
T4FHSA	First Home Savings Account (FHSA) Contributions	
	Charitable/Political Donations	
	Paid Property Tax/Rent receipts	
	Paid Support (child, spousal)	
	Professional dues receipts	
	Eligible teaching supplies for educators	
	Medical expenses – Dental, eye care, prescriptions, massage, health ins.	
	Childcare receipts	
	Moving expenses	
	Carrying charges & interest paid to earn income from investments (non-registered accounts)	