



SECTION 1 — CLIENT PERSONAL INFORMATION

First Name (as registered with CRA)

Last Name (as registered with CRA)

Date of Birth (DD/MM/YYYY)

Date of Entry into Canada

Email Address

Street Address

City

Province

Postal Code

Home Phone

Cell Phone

Work Phone

Social Insurance Number (SIN)

Canadian Citizen?

Yes

No

SECTION 2 — MARITAL STATUS

Single

Married

Separated

Divorced

Widowed

Common-Law

Did your marital status change during 2025?

Yes

No

If yes — date of change (DD/MM/YYYY):

SECTION 3 — SPOUSAL INFORMATION

Spouse First Name

Spouse Last Name

SIN

Date of Birth (DD/MM/YYYY)

Date of Entry into Canada

SECTION 4 — DEPENDANTS

Full Name	SIN	Birth Date (DD/MM/YYYY)	Net Income (\$)

SECTION 5 — BUSINESS USE OF HOME

Square Footage of Office	Sq. ft.
Total Square Footage of Home	Sq. ft.
Electricity	
Heat	
Insurance	
Maintenance	
Mortgage Interest Include INTEREST portion only — not full mortgage payment.	
Property Taxes	
Rent Paid	
Other Provide description:	

SECTION 6 — REAL ESTATE

Did you sell, gift, or change the use of any real estate property during 2025?

- No — No real estate activity to report for this tax year
- Yes — Please complete the ABNI Real Estate Checklist (contact our office)

SECTION 7 — FOREIGN INCOME VERIFICATION

Did you own specified foreign property exceeding \$100,000 CAD at any point during 2025?

No Yes — Form T1135 required

Important Note:

Specified foreign property includes: foreign bank accounts, shares in non-resident corporations, and real estate outside Canada not used for personal purposes.

Substantial CRA penalties apply for non-compliance.

Reference: canada.ca | CRA Form T1135

SECTION 8 — B.C. RENTERS TAX CREDIT (if applicable)

Property #1

Rental Address Monthly Rent (\$)

Number of Months Rented Name of Landlord / Property Manager

Property #2

Rental Address Monthly Rent (\$)

Number of Months Rented Name of Landlord / Property Manager

ABNI FINANCIAL
SERVICES

SECTION 9 — INCOME SOURCES (check all that apply and attach relevant tax slips)

PERSONAL INCOME

- T3 / T4 / T4A — Salaries & Employment Income
- T4A(P) — CPP Benefits
- T4(OAS) — Old Age Security Benefits
- T4A — Other Pension or Superannuation
- T4RIF — RRIF Income
- T4E — Employment Insurance Benefits
- T5007 — Social Services Benefits
- T4RSP — RRSP Income
- Other Employment Benefits
- T4A / T4E — CERB
- Self-Employment Income

INVESTMENT INCOME

- T5 / T4PS — Interest & Dividends
- T5008 — Statement of Security Transactions
- Interest on Prior Year Tax Refund
- Realized Gain / Loss Report
- T3 — Income from Mutual Funds
- Annuities
- Rental Income
- T5013 — Net Partnership Income (Loss)





SECTION 10 — DEDUCTIONS, CREDITS & OTHER INFORMATION

<input type="checkbox"/> RRSP Contributions	<input type="checkbox"/> Employment Expenses (T2200 required)
<input type="checkbox"/> Installment Payments	<input type="checkbox"/> Donations / Political Contributions
<input type="checkbox"/> First Home Savings Account (FHSA)	<input type="checkbox"/> Medical / Attendant Care Expenses
<input type="checkbox"/> Childcare Expenses (full details required)	<input type="checkbox"/> Investment Counsel & Accounting Fees
<input type="checkbox"/> Union / Professional Dues	<input type="checkbox"/> Interest & Carrying Charges on Investments
<input type="checkbox"/> Moving Expenses (full details required)	<input type="checkbox"/> T2202 — Tuition Slips
<input type="checkbox"/> Spousal Support Payments	

SECTION 11 — ADDITIONAL NOTES / COMMENTS

Was any FHSA (First Home Savings Account) opened in 2025?

Yes No

Important Disclaimer:

This checklist covers the most common income sources, deductions, and tax credits. Every individual's tax situation is unique. If you have questions or additional items to discuss, please contact our office or email accounting@abni.ca before submitting. Thank you for choosing ABNI Financial Services.

Please authorize ABNI Financial Services as your CRA Level 2 representative. Business Number: 725748826