



SHEFALI JARIWALA
CHARTERED PROFESSIONAL ACCOUNTANT

2025 Personal Tax Questionnaire

	Taxpayer	Spouse/Common-law partner
1) Name	_____	_____
Address (Including Postal Code)	_____	_____
Telephone number(s)	_____	_____
E-mail address	_____	_____
Birth Date (dd-mmm-yyyy)	_____	_____
Citizenship	_____	_____
SIN (Social Insurance Number)	_____	_____
Province of residence at year end	_____	_____

2) Please Indicate your marital status as at December 31, 2025:

If changed from previous year, please indicate date of change:

3) Did your spouse have any income in 2025? Yes No
If we are preparing his or her return, please provide details of his or her income in a separate questionnaire. If we are not preparing his or her return, please provide us with his or her net income for 2025, as indicated on lines 15000 and 23600 of their 2025 personal tax return:

4) Are you a Canadian citizen? Yes No

Provide Information to Elections Canada? Yes No

5) Dependants

Name	Birth Date (dd-mmm-yyyy)	SIN	Net Income
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

6) If you became (new immigrant/student/work-permit entry) or ceased (non-resident/ out of Canada for more than 180 days) to be resident of Canada in 2025, Please enter:

Entry Date

Exit Date

7) At any time in 2025, did you own or acquire non-Canadian investment property with a total cost in excess of \$100,000? Yes No

8) Did you dispose of a property in 2025 for which you are claiming a principal residence exemption? If yes, please provide a brief description of the use of the property over the years of ownership. We will contact you to discuss further as necessary.

Year of acquisition		Description of use:
Proceeds	\$	
Expense Incurred	\$	

9) If you attended university, college, or any other post-secondary institution, please attach your tuition receipt form T2202A so that you can claim the tuition tax credit. *Note:* if you have children that are in university, the parent may be able to claim this deduction if the child has low income.

10) If you are paying interest on a student loan, please provide the eligible interest paid in 2025 or the eligible interest paid in the preceding five years if you have not already claimed these amounts.

11) If you made any charitable donations and/or political donations, please provide totals of qualified donation receipts

12) Please total all medical expense receipts by individual in your family (actual receipts not required). Total qualified medical receipts:

Individuals Name					
Amount	\$	\$	\$	\$	\$

13) If you had child care expenses, please provide the name and address of the institution or person providing these services. If the child care expenses are paid to an individual, please obtain their S.I.N.

Dependant Name

Paid To Name/SIN

Weeks

Amount Paid

14) If you are a senior citizen or a caregiver for an elderly parent, please provide a brief description and amount(s) of renovation costs incurred within the year to make the home safer for the senior to be able to continue to live at home:

15) Were you a first time home buyer in 2025? Yes No

16) Did you make any RRSP contributions or FHSA? If yes, the related information slip(s) you received from the bank must be attached. Clients which have Home Buyers Plan repayments should provide our office with details concerning required repayments. For new clients, please provide us with RRSP carry forward information as per the most recent assessment notice from CRA.

17) Please complete the following for the current year Ontario property tax and rent credits:

Home address	# of months residence in 2025	Rent/Taxes paid	Municipality
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18) Please provide paper or PDF/picture copies of all tax slips, including COVID-19 related benefits and/or subsidies, received for the 2025 taxation year (i.e. T4, T3, T5, T4A, etc.).

19) Did you buy or sell any securities/assets during the year. If yes, please outline the details below and provide a paper or PDF/picture copy of your investment reporting package (i.e. realized gain/loss and investment advisor fee reports).

Name of the security/asset	Prcoceeds of disposition	Adjusted cost base	Other selling expenses
	\$	\$	\$
	\$	\$	\$

Additional Information

EMPLOYMENT EXPENSES

20) If you are eligible to claim specific employment expenses, summarize your employment expenses in the table below and ensure you retain your signed T2200 or T2200S.

EMPLOYMENT EXPENSES			
	Amount paid (including GST/HST)		Amount paid (including GST/HST)
Meals and entertainment		Telephone	
Gifts		Internet	
Supplies		Cable	
Salary paid to an assistant		Cellular	
Office rent		Courier/Post	
Accounting and legal fees		Professional development	
Foreign travel		Equipment repairs	
Travel		Equipment rentals	
Accommodation		Equipment insurance	
Travel meals			
AUTOMOBILE EXPENSES			
	Full amount paid (including GST/HST)		
Fuel			
Car loan interest			
Car insurance			
License and registration			
Maintenance and repairs			
Annual lease payments*			
CAA			
Business parking			
Car make & year of purchase			
KM used for business			
Total KM driven			
HOME OFFICE / STUDIO EXPENSES			
			Full amount paid
Utilities (heat, electricity, water, garbage)			
Maintenance (cleaning supplies, light bulb etc)			
Insurance (commission employees only)			
Property taxes (commission employees only)			
Rent			
Condominium fees			
Other – specify:			
Square footage of home office			
Total square footage of home			
EQUIPMENT PURCHASED			
Description	Full amount paid	Description	Full amount paid

*If you began leasing a vehicle for business purposes in the 2025 taxation year, please provide a copy of the lease agreement.

RENTAL INCOME AND EXPENSES

21) If you had rental income from any source, please list the rental income and expense as follows:

	1 st Property	2 nd Property
Full Address		
Rental income (gross)	\$	\$
Expenses:		
Advertising	\$	\$
Insurance	\$	\$
Interest and Bank Charges	\$	\$
Repairs and maintenance	\$	\$
Management and administration fees	\$	\$
Property taxes	\$	\$
Utilities (heat, electricity, water)	\$	\$
Other – specify:		
During 2025, did you carry out any major repairs or acquire any furnishings? Specify the nature, date, and amount for each:		