



www.prosperitybusiness.ca

140-810 Central Avenue
Saskatoon, SK S7N 2G6
Tel: 306-934-6980
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Email: info@prosperitybusiness.ca

PROSPERITY BUSINESS SOLUTIONS INC.

2025 T1 CLIENT QUESTIONNAIRE AND CHECKLIST

Please complete and return to us with your tax information.

TAX PAYER 1

Name: _____ Email: _____

SIN: _____ Telephone: _____

Date of Birth: _____ Canadian Citizen? Yes No

May Canada Revenue Agency provide your name, address and SIN to Elections Canada to keep the voters list up-to-date? Yes No

Marital Status: Married Single
Living common-law Separated Divorced
Widowed

Date of Status Change in 2025: _____
(if applicable)

TAX PAYER 2 (Spouse/Partner)

Name: _____ Email: _____

SIN: _____ Telephone: _____

Date of Birth: _____ Canadian Citizen? Yes No

May Canada Revenue Agency provide your name, address and SIN to Elections Canada to keep the voters list up-to-date? Yes No

Current Address: _____

Were you a First Time Home Buyer in 2025? Yes No

Did you sell your Principal Residence in 2025? Yes No Date of Sale yyyy/mm/dd: _____

Address: _____

Year of Original Acquisition: _____ Proceeds of Disposition: \$ _____



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Dependents:

1. _____ /_____/____ SIN: _____
Name DOB (yyyy/mm/dd)
2. _____ /_____/____ SIN: _____
Name DOB (yyyy/mm/dd)
3. _____ /_____/____ SIN: _____
Name DOB (yyyy/mm/dd)
4. _____ /_____/____ SIN: _____
Name DOB (yyyy/mm/dd)

Foreign Income Verification Statement (T1135)

Declaration

Please choose one of the following with regards to Foreign Property Held in 2025 (foreign property includes funds held outside of Canada, shares of foreign companies even if held in a Canadian brokerage account – not in an RRSP, loans to non-residents, interests in non-resident trusts, real estate outside of Canada – other than personal use real estate, and any other property held outside Canada):

- A. No – I did not have any foreign property with a total cost of more than \$100,000CAD at any point in 2025.
B. Yes – I did have foreign property during 2025 with a total cost of more than \$100,000CAD. I will obtain the required information for Prosperity Business Solutions Inc. to prepare the form. I agree to pay any additional fees incurred to prepare the T1135 Form.
C. Yes – I did have foreign property during 2025 with a total cost of more than \$100,000CAD. I will prepare and file the form myself and I am aware of the potential penalty applied by the CRA if the form is not filed by the filing deadline of my personal tax return. I understand that the form is due by April 30, 2026.

Signature

Date

Signature

Date



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2025 Tax Year Personal Income Tax Checklist

Please use the checklist below to make sure you have included all the documents for your taxes:

✓ **CRA Assessments:**

- Last year's Notice of Assessment
- Instalment Payments

✓ **Employment Income:**

- T4
- T4A
- T4PS

✓ **Employment Expenses:**

- T2200 plus a list of the expenses

✓ **Pension Income:**

- T4A
- T4AOAS
- T4AP
- T4RIF
- T4RSP

✓ **Investment Income:**

- T3
- T5
- T5008
- T5013

✓ **Capital Gains:**

- T5013
- Trading summaries from Brokers
- Annual statement from Mutual Funds

✓ **Other Income:**

- Rental income and expenses information
- Farming income and expenses information
- Self-employment income and expense
- ✓ information (CPP contributions/EI premiums)

Deductions and Credits:

- RRSP
- Childcare receipts
- Adoption expenses
- Support payment information
- Caregiver/disability amount
- Tuition fees – T2202/T2202A
- Student Loan Interest slips
- Union/Professional dues
- New Home Buyer
- Accounting fees paid on investment advice
- Donations
- Medical receipts (less any reimbursements from Insurance)
- Premiums paid to Private Medical Insurance plans
- Saskatchewan Graduate Retention