

NAME: _____ **SPOUSE:** _____

ADDRESS (if changed since December 31, 2024) _____

PRIMARY PHONE: _____

EMAIL ADDRESS: _____

FORD KEAST WEALTH MANAGEMENT CONSULTATION: YES, PLEASE CONTACT ME NO, THANK YOU

	INDIVIDUAL 1		INDIVIDUAL 2	
	YES	NO	YES	NO
Did you own foreign property with cost exceeding CAD \$100,000 at any time in 2025? Failure to disclose this information annually to the CRA will result in significant penalties. (Foreign properties do not include vacation properties used solely for personal use.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Did you open a First Home Savings Account (FHSA) in 2025?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Did you sell your home or cottage in 2025? Failure to report the sale of a home as your Principal Residence could result in significant penalties even if the gain is fully tax-exempt.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If yes, did you own the property for less than 365 days?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Did you have a short-term rental during 2025?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If yes, were you compliant with all applicable provincial or municipal licensing, permitting, or registration requirements on December 31, 2025?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

NEW DEPENDANTS OR COMMON-LAW PARTNER IN 2025:

NAME (INCLUDING MIDDLE NAME)	RELATIONSHIP TO YOU	DATE OF BIRTH
_____	_____	_____
_____	_____	_____

Please provide all income tax slips received for the preparation of your 2025 personal taxes. These may include, but are not limited to: **T4, T4A, T4PS, T3, T5, T5013, T4A, T4A(OAS), T4E, RC62, T5007, T4A(P), T4A, T10, T4RSP and T4RIF slips.**

If you received additional income from other sources, please find below a summary of the types of documentation required in order to complete your 2024 return:

Sources of Income	Required Documentation
Business / Rental / Professional / Farming or Fishing Income	Details of all income and expenses, home office expenses (if any), business use of personal vehicles (if any), proof of compliance for short-term rentals
Tips	Summary of tips earned in 2025
Stock Options	Details of the stock options received or exercised
Income from sources outside Canada	From the U.S: W-2, K-1, 1042-S, 1099 Other slips or details where no slips available
Sale of stocks, bonds, real estate, mutual funds or transactions with crypto currencies	Gain/Loss Statement if available, or; Description of assets, details of purchase (date and cost), details of sale (date, proceeds, selling costs)
Any other income not listed above. (Alimony, separation allowance, child support, workers compensation, etc.)	Slips or details where no slips available

If any of the following items are applicable to you in the 2025 calendar year, you may be eligible for additional deductions or credits. Therefore, if any of the below are applicable, please provide the required documentation as noted below.

Expenses and Deductions	Required Documentation
Complete a renovation or home improvements to increase the mobility or safety of your home for a disabled individual or individual age 65 or older	Receipts and details
Create a self-contained secondary unit to allow a relative senior or adult with a disability to live with you	Receipts and details
Medical expenses for yourself, your spouse, or dependent	Summary of expenses and provide receipts
Charitable or political donations	Tax receipts
RRSP contributions	Contribution slips (including first 60 days of 2026)
Interest on money borrowed to purchase non-registered investments	Statements and details
Moving expenses to move at least 40kms closer to work or school	Details and receipts including dates of move
Union or professional dues	Tax receipts (if amount not already shown on T4 slip)
Public transportation pass	Details and receipts -> age 65+ only
Paid tuition for yourself or dependent to attend university, college, or other qualifying school	T2202A (Canadian school) or TL11A (outside Canada)
Qualifying student loan	Interest statement if interest paid on student loan
Childcare expenses (including summer camps)	Official receipt provided by caregiver
Paid alimony, separation allowance or child support	Provide name, SIN, and address of recipient. Details of amounts paid
Property taxes or rent (low-income earners, students or seniors)	Final 2025 property tax statement (stamped PAID or include proof of payment), or rent receipts
Fees paid to earn investment income	Statements or details of fees paid (does not include fees in RRSP or TFSA)
Your spouse or dependent became disabled during the year	If yes, please contact us
Incur any boarding or lodging costs as a transport employee (e.g. Long-haul truck driver)	Form TL2 to be completed by your employer, details of trips and expenses paid
Incur expenses as an employee: <ul style="list-style-type: none"> • To maintain an office in your home • Use personal vehicle without reimbursement • Other business expenses 	Form T2200 to be completed by your employer, receipts, and detailed auto log , if applicable
Purchase tools as a tradesperson or apprentice	Receipts
Purchase your "first home"	If yes, please provide address and date of purchase
Support a relative who is disabled or infirm	Details, including the income of the person receiving care (line 23600 of his/her tax return)
Incur expenses as a teacher or Early Childhood Educator	Receipts and school certification

U.S. CITIZENS AND PERMANENT RESIDENTS (GREEN CARD HOLDERS):

U.S. Citizens and Green Card holders have an ongoing obligation to file a US federal (and applicable state) returns annually regardless of where they physically live.

	Yes	No
Are you, your spouse, or your dependant a U.S. citizen or permanent resident (green card holder)?	<input type="checkbox"/>	<input type="checkbox"/>
Have you spent more than thirty (30) days in the U.S. in any of the last three (3) years?	<input type="checkbox"/>	<input type="checkbox"/>

This checklist is of a general nature and is not intended to cover all questions or prompts concerning all of your sources of income or allowable deductions/credits. **Should you have any questions or concerns, please contact your Ford Keast representative.**