

2025 PERSONAL TAX INFORMATION EXISTING CLIENTS

Choose **one** option below to receive a copy of your tax return and forms

I would like to receive my tax package and forms:

iFirm Portal

Email

Paper (pick up)

Name

Preferred Contact Method

Email

Phone

Email (required)

Phone

Address

City

Postal Code

Province

Filing for Spouse too? Spouse's Name

Yes

No

Spouse's Preferred Contact Method

Email

Phone

Spouse's Email (required if we are filing for them too)

Spouse's Phone

Are we filing a tax return any Children/Dependant? Yes No If Yes, please provide names below

Additional Questions

Yes

No

Details (Text adjusts to fit space)

1. Did you or your spouse hold foreign income producing real estate, securities traded on a foreign stock exchange, foreign bank accounts, and/or foreign loans that had a cost greater than \$100,000 at any time during 2025?			
2. Did you sell your home in 2025 or 2026?			
3. Did you operate a short-term rental (AirBnB, VRBO) in 2025?			
3a. If Yes to Q3, was the rental property compliant with all Provincial and Municipal licensing, permitting, and registration requirements for the entire calendar year?			
3b. If Yes to Q3, was there a change from short-term to long-term rental (or vice versa) in 2025 or 2026? Short-term rental eligibility			
4. Any change to Canadian Citizenship in 2025? If yes, provide details.			
5. Any change in marital status in 2025? If yes, provide details and date of change.			
6. Did you have any new dependents in 2025? If yes, provide details.			
7. Did you create a secondary unit in your home for a senior or disabled family member? MHRTC			
8. Do you authorize CRA to provide your email address to the Gov't of AB & Ministry of Hospital and Surgical Health Services to receive information on organ and tissue donation?			
9. Did you open an FHSA (First Home Savings Account) in 2025? FHSA			
10. Have you provided us with all information that is needed to complete this tax return? If not, what is missing?			

For a detailed review of income, tax deductions, and tax credits, see our [2025 Detailed Personal Checklist](#)

Please note: Banking information can ONLY be changed by updating it through your "My Account" with CRA