

2025 Annual Taxpayer Update – SIGNATURE

Canada Revenue Agency (CRA) requires us to verify specific questions on your tax return.
 Your answers may change from year to year. Please review this form carefully for any updates.
 Each individual person filing a tax return must complete this form by answering YES or NO to the questions.

Taxpayer Name: _____ (one form per person)

Tax Return Delivery Option

	YES	NO	Information
Do you want a paper copy of your tax return? \$5.00 fee applies for each printed tax package	<input type="checkbox"/>	<input type="checkbox"/>	If no, an electronic copy will be delivered by email or portal If yes, you are agreeing to the \$5.00 per person fee



Signature: _____ Date: _____

I have provided up-to-date information and checked both pages of this form.
 Any information left blank has been previously provided and/or there are no changes from the prior tax filing.
 I have received links to optional checklists and worksheets to assist me in providing complete tax information.

New Clients

	YES	NO	Information Required
Do we have your CRA account authorization?	<input type="checkbox"/>	<input type="checkbox"/>	If no, follow the steps for Authorizing a Representative

Marital Status and Family

	YES	NO	Information / Documents Required
Has your marital status changed since last filing? If yes, provide marital status	<input type="checkbox"/>	<input type="checkbox"/>	Marital Status: _____ Date of Change: _____
Are we preparing your spouse or common-law partner's tax return with yours? If no, provide details from their tax return	<input type="checkbox"/>	<input type="checkbox"/>	Spouse Name: _____ Spouse SIN: _____ Spouse Net Income (line 23600): _____
Are there changes to your dependants? If yes, provide list of dependants	<input type="checkbox"/>	<input type="checkbox"/>	List names, dates-of-birth, SIN numbers and addresses For completeness use our form: List of Dependants

Contact Information

	YES	NO	Information / Documents Required
Has your mailing address changed?	<input type="checkbox"/>	<input type="checkbox"/>	Mailing Address: _____
Is the home address the same as the mailing?	<input type="checkbox"/>	<input type="checkbox"/>	_____
Did you sell your principal residence in 2025?	<input type="checkbox"/>	<input type="checkbox"/>	If yes, provide sale documents for tax return
Did you sell your principal residence in 2026?	<input type="checkbox"/>	<input type="checkbox"/>	If yes, provide sale documents next year
Did you own the property for less than 365 days?	<input type="checkbox"/>	<input type="checkbox"/>	If yes, provide purchase and sale documents
Have any of your phone numbers changed? Indicate preferred phone numbers	<input type="checkbox"/>	<input type="checkbox"/>	Home Phone: _____ Mobile Phone: _____ Business Phone: _____
Has your preferred email address changed? Enter preferred email for us to reach you	<input type="checkbox"/>	<input type="checkbox"/>	Email address for Koroll & Company use (not for CRA): _____

Province or Country of Residence

	YES	NO	Information Required
Was your province of residence different than your mailing address at December 31, 2025?	<input type="checkbox"/>	<input type="checkbox"/>	Province of Residence: _____
Did you move provinces in 2025 or 2026?	<input type="checkbox"/>	<input type="checkbox"/>	Date of Move: _____
Did you immigrate or emigrate in 2025? If yes, provide dates of entry OR departure	<input type="checkbox"/>	<input type="checkbox"/>	Date of Entry: _____ Date of Departure: _____
Are you the resident or citizen of another country? If yes, indicate country of residence AND citizenship	<input type="checkbox"/>	<input type="checkbox"/>	Country of Residence: _____ Citizenship Country: _____



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TAX TIP Koroll & Company does NOT have complete access to your CRA account via our Represent A Client login.
 Only the taxpayer can have complete access to their tax account via their My Account login.
 CRA continues to transition more of their services to taxpayer access only.

ONLY THE TAXPAYER CAN:

- change Direct Deposit information
- schedule payment arrangements
- manage email notifications
- authorize/cancel other representatives

REPRESENTATIVE CAN (BUT ONLY WHEN FILING A TAX RETURN):

- update mailing address
- update marital status or dependants
- add or change email address for online email

AT OTHER TIMES, ONLY THE TAXPAYER CAN MAKE THESE CHANGES

Canada Revenue Agency (CRA) Account and Notices

	YES	NO	Explanation OR Information Required
Do you have a CRA My Account login? <i>If the login is not working, please select NO</i>	<input type="checkbox"/>	<input type="checkbox"/>	This means you have an active log-in to your tax account
TAX TIP Register or recover your login online			Register for a CRA Account OR Sign in to Your CRA Account
Are you registered for CRA's online mail service? <i>If no, answer (a). If yes, skip to (b)</i>	<input type="checkbox"/>	<input type="checkbox"/>	This means you are currently receiving your CRA notices by email notification instead of by paper/mail
(a) Do you want us to register an email address for CRA's online mail service? <i>If yes, provide email</i>	<input type="checkbox"/>	<input type="checkbox"/>	Email address for CRA online email registration: _____
(b) Do you need to update your email address with CRA's online mail? <i>If yes, provide new email</i>	<input type="checkbox"/>	<input type="checkbox"/>	Replacement email address for CRA online email: _____
<i>If you have answered "NO" to the above questions, we will not submit your email to CRA.</i>			
Did you receive notices from CRA in 2025 and 2026? <i>If yes, provide copies</i>	<input type="checkbox"/>	<input type="checkbox"/>	Assessments, Reassessments, Statements of Account, Instalments and other notices
Are there prior year issues needing investigation?	<input type="checkbox"/>	<input type="checkbox"/>	Let us know - provide details
Have you signed the T183 Information Return? <i>Also known as the EFILE authorization form.</i>	<input type="checkbox"/>	<input type="checkbox"/>	MANDATORY form for signature by ALL taxpayers: T183 Information Return - 2025

Canada Revenue Agency (CRA) Questions

	YES	NO	Information / Documents Required
Do you have a First Home Savings Account (FHSA)? <i>If yes, provide contract information</i>	<input type="checkbox"/>	<input type="checkbox"/>	FHSA Plan Contract Number(s): _____ Year FHSA Plan Opened: _____
Do you have a Tax-Free Savings Account (TFSA)?	<input type="checkbox"/>	<input type="checkbox"/>	No details required
Are you a U.S. citizen?	<input type="checkbox"/>	<input type="checkbox"/>	No details required
Are you a Canadian citizen?	<input type="checkbox"/>	<input type="checkbox"/>	No details required
If no, are you a Permanent Resident?	<input type="checkbox"/>	<input type="checkbox"/>	Provide citizenship details in on previous page
Do you authorize CRA to provide your information to Elections Canada?	<input type="checkbox"/>	<input type="checkbox"/>	This authorization is required each year For more information see Elections Canada
Do you consent to share contact details to Ontario Organ and Tissue Donor Registry?	<input type="checkbox"/>	<input type="checkbox"/>	This authorization is for INFO ONLY to Ontario Health. It is NOT registering your consent to organ donation.
Did you own foreign property with a total cost of over CAN\$100,000 at any time in 2025? <i>If YES or NO, provide signed form</i>	<input type="checkbox"/>	<input type="checkbox"/>	MANDATORY form for signature by ALL taxpayers: Foreign Reporting Declaration

CHECKLISTS and WORKSHEETS
www.koroll.ca

Gather your tax information and ensure you don't miss any available credits!
[Personal Tax Checklist – 2025](#)

Worksheets can save you money by keeping tax preparation fees to a minimum!
[Self-Employment Worksheet – 2025](#)
[Rental Property Worksheet – 2025](#)
[Employment Expenses Worksheet – 2025](#)



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