**[INSERT FIRM NAME]**

**PERSONAL TAX ORGANIZER**

**2023 TAX YEAR**

|  |
| --- |
| ***DISCLAIMER*** *This personal tax organizer is intended for Canadian resident taxpayers only. Information on provincial credits has been excluded.*  *The purpose of this personal tax organizer is to assist you in gathering the information and supporting documents we need to complete your personal income tax return. Please complete the following sections to the best of your knowledge, and if you have any questions, please contact [insert accountant name and contact information].* |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name: |  |  | Spouse / Common-law partner: |  |
| SIN: |  |  | SIN: |  |
| Date of birth: |  |  | Date of birth: |  |
| Email address: |  |  | Email address: |  |
| Phone number: |  |  | Phone number: |  |
| Marital status: |  |  |  |  |
| Address: |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Dependant’s Name** | **Relationship** | **Date of Birth** | **SIN** | **Net Income** | **Prepare Return?** |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

| **General Information** | **Self** | **Spouse** |
| --- | --- | --- |
| Are you a Canadian citizen? |  |  |
| As a Canadian citizen, do you authorize the CRA to give your name, address, date of birth and citizenship to elections Canada to update the National Register of Electors? |  |  |
| Are you a U.S. citizen or green card holder? |  |  |
| Are you a Canadian tax resident? Please reach out to us if you don’t know. |  |  |
| Do you believe you have income that may be exempt under the *Indian Act*? |  |  |
| Was there a change in your marital status? If so, please provide date of change and a separation / divorce agreement. |  |  |
| Are you registered for CRA’s My Account? |  |  |
| Are you registered for direct deposit with CRA? If not, please provide us with a void cheque or register directly using My Account or calling the CRA individual taxpayer line. |  |  |
| Did you pay tax instalments to the CRA? If yes, please indicate the amount. |  |  |
| At any time during the year, did you own foreign property with a total aggregate cost in excess of CAD $100,000? |  |  |
| Do you own shares or units of non-publicly traded foreign corporations, partnerships or trusts? Please reach out if you are unsure. |  |  |
| Are you a beneficiary of a foreign trust? Please reach out if you are unsure. |  |  |
| Did you transact in cryptocurrency to purchase or sell goods and services? |  |  |
| Did you or your spouse purchase a principal residence during the year? If so, were you first-time home buyers (i.e., you or your spouse have not owned a home in the last five years)? |  |  |
| Are you a GST/HST registrant? If so, do you need us to file GST/HST returns for you? |  |  |
| Are you up to date with your tax filings with CRA? |  |  |
| Did you hold any property in trust for someone else’s benefit during the year? Please reach out if you are unsure. |  |  |
| Are you required to file an Underused Housing Return? If so, do you need us to prepare this for you? Please reach out if you are unsure. |  |  |

For the following sections of this checklist, please tick off (“x”) the boxes that apply to you, your spouse or dependants and send us the information requested in the relevant documents / slips column.

| **General Information** | **Self** | **Spouse** | **Dependants** | **Relevant Documents / Slips** |
| --- | --- | --- | --- | --- |
| Employment or commission income |  |  |  | T4 / T4PS and details of other benefits or employment income not on T4 slip |
| Scholarship or research grants |  |  |  | T4A |
| Employer profit sharing programs |  |  |  | T4PS |
| Stock option benefit from public or private companies |  |  |  | Statements as applicable |
| Severance package |  |  |  | T4 / T4A |
| Old age security pension |  |  |  | T4A(OAS) |
| Canada or Quebec Pension Plan benefits |  |  |  | T4A(P) |
| Other pensions or superannuation / RRSP Income and RRIF |  |  |  | T4A / T4RSP / T4RIF / T4A-RCA |
| U.S. social security benefits |  |  |  | Forms SSA-1042S and SSA-1099 |
| Other foreign pension income |  |  |  | Foreign pension statements |
| Universal child care benefit |  |  |  | RC62 slip |
| Workers’ compensation benefits |  |  |  | T5007 |
| Employment insurance or maternity / parental leave benefits |  |  |  | T4E / T4A / T5007 |
| Investment income (e.g., dividends, interest) |  |  |  | T4 / T4PS and details of other benefits or employment income not on T4 slip |
| Foreign income |  |  |  | T3 / T5 / 1099 / NR4 and year-end summaries, including any foreign tax paid |
| Foreign income verification report (T1135) |  |  |  | Provide details of foreign investments or summary from financial advisor |
| Limited partnership income |  |  |  | T5013 |
| Rental property |  |  |  | Summary of income, expenses and asset additions |
| Realized capital gains / losses |  |  |  | Gain / loss summary reporting dates of sales and purchases, proceeds and cost |
| Disposition of principal residence |  |  |  | Details including date of sale and purchase, proceeds received and cost |
| Disposition of rental property |  |  |  | Details including date of sale and purchase, proceeds received and cost |
| Change in use (full or partial) in real estate properties (investment or personal) |  |  |  | Summary of cost and fair value of the property at the time of the change in use |
| Alimony or separation payments received |  |  |  | Amount and separation agreement to support |
| Self-employed / sole proprietor business activities |  |  |  | T4A / Summary of income, expenses and asset additions as well as HST/GST number. Please also provide details of any COVID-19 subsidies or loans received. |
| Guaranteed income supplements, spouse’s allowance, social assistance, workers’ compensation payments |  |  |  | T4A(OAS) / T5007 / Details |
| Prior year GST rebate |  |  |  | Prior year Notice of Assessment |
| Disposition of private company shares |  |  |  | Details including ACB and proceeds. Indicate if the company was a Qualified Small Business Corporation. Please reach out if you are unsure. |
| Other: (please specify) |  |  |  | As applicable |

| **Deductions / Credits** | **Self** | **Spouse** | **Dependants** | **Relevant Documents / Slips** |
| --- | --- | --- | --- | --- |
| Pension contributions |  |  |  | T4 / T4A slips |
| RRSP contributions |  |  |  | RRSP slips (include Dec 31 statements and contributions for the first 60 days of 2022) |
| Tax shelter investments |  |  |  | T5013 / T101 slips |
| Union or professional dues |  |  |  | T4 or Payment information (receipts) |
| Child care expenses |  |  |  | Receipts, annual statements, T4 of child care provider, eligible summer camp receipts |
| Attendant care expenses |  |  |  | Annual statement / summary of eligible expenses from nursing or retirement home |
| Allowable business investment losses |  |  |  | Details as applicable |
| Moving expenses (for a new job or to study full time) |  |  |  | Summary of expenses / receipts |
| Alimony or separation allowance |  |  |  | Amount and separation agreement support |
| Investment counsel fees / carrying charges / interest |  |  |  | Annual statement / summary |
| Employment expenses, including GST/HST portion (e.g., car, home office) |  |  |  | Summary of expenses / receipts, signed T2200 from employer |
| Eligible educator school supplies |  |  |  | Summary of expenses / receipts, signed letter from employer |
| Home accessibility expenses |  |  |  | Summary of expenses / receipts |
| Adoption expenses |  |  |  | Summary of expenses / receipts |
| Tuition fees (self, spouse, dependants) |  |  |  | T2202 slips (signed back page by dependant if tuition transferred) |
| Student loan interest |  |  |  | Statement of interest paid |
| Medical expenses other than amounts reimbursed |  |  |  | Summary of expenses, including pharmacist or medical plan summary of amounts paid during the year, if available |
| Charitable donations |  |  |  | Official donation receipts – include details in schedule provided |
| Political contributions |  |  |  | Signed political contribution receipts |
| Digital news subscription |  |  |  | Official signed QCJO receipts |