

Personal Tax Organizer

Tax Year: 20 ____

Name:

Telephone Number:

E-mail:

Please complete each box below and provide details and/or receipts where necessary.

YES NO Personal Changes

- Changes in Marital Status?
- Additional Dependants?
- Own Foreign Investments costing over \$100,000 CDN?
- Did you purchase your first home in 2022?
- Have you moved? (Provide date and new address)

Income

- T4** - Employment Income
- T4A OAS** - Old Age Security
- T4AP** - Canada or Quebec Pension
- T4A** - Pension/Other Income
- T4RRIF/T4RSP** - RRIF/RRSP Income
- T4E** - Employment Insurance

Other Income

- Business/Professional Income - T2125 Summary
- Rental Property Income - T776 Summary
- T5013 - Partnership Income
- Spousal Support Received
- Scholarship, Bursary & Fellowship Income

Investments

- T3** - Income from a Trust
- T5** - Income Interest and Dividends
- Capital Gains or Losses* (Brokerage report/self directed)
- T1135** - Foreign Income Statement
- T1134** - Foreign Affiliate Reporting

*This includes dispositions of personal homes and cottages.

YES NO Deductions - Please provide receipts

- RRSP Contributions (remainder of 2022 and first 60 days of 2023)
- Home Buyers Plan
- Union or Professional Dues
- Child Care Expenses (including caregivers' social insurance number if not a childcare organization)
- Moving Expenses
- Spousal Support Paid (provide agreement)
- Child Support paid (provide agreement)
- Interest Expense
- Interest on Student Loans
- Registered Investment/Management Fees
- Employment Expenses (enclose signed T2200)
- Did you work from home during 2022?
If yes, provide the # of workdays from home

Credits/Receipts

- Tuition (enclose completed and signed T2202 or TL11A foreign tuition)
- Medical Receipts (including Attendant Care)
- Medical Insurance Premiums (include annual statement)
- Donations
- Property Taxes (Final 2022 bill)/Rent Receipts
- Teacher and Early Child Educator School Supply Tax Credit
- Are you 65 yrs or older and did a home safety renovation to your home in 2022? If yes, please provide receipts

Payments

- Tax Instalments for the 2022 year \$
- Tax Instalment - paid March 15, 2023 \$