



Chartered Professional Accountants

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Personal Tax Organizer

Tax Year: 20 ____

Name: _____
Telephone Number: _____
E-mail: _____

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

NEW **Did you open a First Home Savings Account in 2023? If yes, please provide us the T4FHSA**

YES	NO	<u>Personal Changes</u>	YES	NO	<u>Deductions - Please provide receipts</u>
		Changes in Marital Status?			RRSP Contributions (remainder of 2023 and first 60 days of 2024)
		Additional Dependants?			Home Buyers Plan
		Own Foreign Investments costing over \$100,000 CDN?			Union or Professional Dues
		Did you purchase your first home in 2023?			Child Care Expenses (including caregivers' social insurance number if not a childcare organization)
		Have you moved? (Provide date and new address)			Moving Expenses
					Spousal Support Paid (provide agreement)
					Child Support paid (provide agreement)
					Interest Expense
					Interest on Student Loans
					Non-Registered Investment/Management Fees
					Employment Expenses (enclose signed T2200)
					<u>Credits/Receipts</u>
					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 2023 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

If you do not wish your name, address, and date of birth to be given to Elections Canada, please check the box.

*This includes dispositions of personal homes and cottages.