



Chartered Professional Accountants

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2024 Personal Tax Organizer

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

Personal Information

Name: _____ Phone: (cell) _____
Address: _____ (home) _____
E-mail: _____ (work) _____

Date of birth: _____
YYYY / MM / DD

Marital Status: _____

Date of change (if applicable): _____

Citizenship: Canadian U.S. Other

If other please specify:

Are you a U.S. resident/green card holder? Yes No

Dependants (if not previously provided):

Name: _____	Name: _____
Date of birth: _____	Date of birth: _____
SIN: _____	SIN: _____

Did you dispose of your principal residence in the year? Yes No

If yes, year of purchase: _____ Sale price: _____ Ownership %: _____

Did you purchase your first home in 2024? Yes No

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

Do you own Foreign Investments (includes US stock at CDN brokerage) costing over \$100,000 CDN?

Yes No

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Income

- ☐ T4 / RL1 - Employment Income
- ☐ T4A (OAS) - Old Age Security
- ☐ T4A(P) / RL2 - Canada or Quebec pension
- ☐ T4A / RL1 / RL2 - Pension / Other Income
- ☐ T4RIF / T4RSP / RL2 - RIFF / RRSP Income / HBP Withdrawal
- ☐ T4E / RL6 - Employment Insurance
- ☐ T4FHSA/RL32 - First Home Saving Account

Other: _____

Other Income

- ☐ Business/Professional Income - T2125 Summary
- ☐ Rental Property Income - T776 Summary
- ☐ T5013 / RL15 - Partnership Income
- ☐ Spousal Support Received
- ☐ Scholarship, Bursary & Fellowship Income
- ☐ Farming Income / Expenses - T2042 Summary

Other: _____

Investments

- ☐ T3 / RL16 - Trust / Mutual Fund Income
- ☐ T5 / RL3 - Dividend / Interest Income
- ☐ Capital Gains or Losses* (brokerage report / self-directed)
- ☐ T5008 / RL18 - Security transactions
- ☐ T1135 - Foreign Income Statement
- ☐ T1134 - Foreign Affiliate Reporting

Other: _____

Deductions and Tax Credits - Please provide receipts

- ☐ Attendance Care / Care in a Facility / Nursing home
- ☐ Charitable Donations
- ☐ Child Care Expenses (including caregiver's social insurance number if not a childcare organization)
- ☐ Child Support Paid (provide agreement)
- ☐ Digital News Subscriptions
- ☐ Disability Tax Credit (If first year please provide T2201)
- ☐ Eligible Educator School Supply Credit
- ☐ Employment Expenses (enclose signed T2200)
- ☐ Flow through shares (T101 if applicable)
- ☐ Home Accessibility Expenses - (65 or older and renovated your home to be more accessible)
- ☐ Home Buyers Amount
- ☐ Interest Paid on Student or Investment Loans
- ☐ Medical Insurance Premiums (include annual statement)
- ☐ Medical Insurance Summary
- ☐ Medical Receipts (if not covered by insurance)
- ☐ Moving Expenses (if more than 40 kms)
- ☐ Non-Registered Investment Management Fees
- ☐ Political Contributions
- ☐ Property Taxes (final 2024 bill) / Rent Receipts
- ☐ RRSP Contributions (remainder of 2024 and first 60 days of 2025)
- ☐ Spousal Support Paid (provide agreement)
- ☐ Tuition (enclose completed and signed T2202 or TL11A foreign tuition)
- ☐ Union or Professional Dues

Other: _____

*Please provide the full investment reporting package from your broker

*This includes disposition of personal homes and cottages.