

2021 PERSONAL INCOME TAX ORGANIZER

Name: _____

Bring details, official receipts, and all tax slips as applicable, for the following items:

Tick if
Applicable

1. Employment income (T4), commissions, tips, Employment Insurance benefits (T4E) _____
2. CRB, pension income, RRIF, annuity, Canada Pension Plan, Old Age Security, or disability benefits (T4A, T4RIF, T4RSP, T4A(P), T4A(OAS), T4A(RCA)) _____
3. Income from mutual funds, estates, trusts or RESP's (T3), partnership (T5013) or joint ventures _____
4. Interest, dividend & other investment income (T5, T5008 and tax reporting package from broker) _____
5. Other: RRSP withdrawal (T4RSP); foreign income (incl. support for tax assessed & paid); WCB & social assistance (T5007); RESP withdrawal, scholarship, grant, bursary or severance (T4A) _____
6. Summary of income and expenses from rental property, farming or self-employment _____
7. Capital gains & losses. If you sold funds, stocks, options, precious metals, cryptocurrency, real estate or tax shelters, bring details regarding the original purchase and sale, including commissions paid _____
8. Details regarding a disposition of a personal residence, including years of ownership, proceeds of sale, and # of years 'designated' as principal residence. Costs of purchases/improvements may be required. _____
9. Details of foreign property owned at any time during 2021, if original cost in aggregate > \$100k Cdn _____
10. Support payments received or paid with respect to child(ren) &/or former spouse _____
11. If you received salary or commissions and were required to pay expenses (auto, home office, or other) prepare a list of the employment expenses and your mileage log (employer signed T2200 **required**) _____
12. RRSP contributions. If applicable, include details of Past Service Adjustment Reversal, Home Buyer Plan or Lifelong Learning Plan _____
13. Union dues, professional dues, and tuition fees (T2202) _____
14. Details of moving expenses and addresses, if you moved at least 40 km closer to new work or school _____
15. Child care & camp fee receipts (name of provider/camp, amount paid, SIN if paid to an individual) _____
16. Carrying charges (interest paid to earn investment income, investment management fees, accounting fees) _____
17. Spouse/common law & children details (full names, birthdates, line 23600 net income, their tuition slips) _____
18. Any change regarding address, marriage, separation, birth, death, emigration/immigration – contact us! _____
19. Medical/dental expenses & private medical plan premiums paid for your spouse and dependents _____
20. Charitable donations and political donations (must provide official receipts) _____
21. Disability amount for self or dependent (form T2201 if first year of claim) _____
22. Caregiver credit if support dependent with physical/mental impairment (specify their age, relationship to you, and their 2021 net income) _____
23. Interest paid on student loans (provide statement of interest paid) _____
24. If you purchased a home (if 1st time buyer) or (in only limited cases) performed significant renovations _____
25. Quebec residents: provide municipal tax bill (or RL-31 slip), a VOID cheque (if not registered for direct deposit for Solidarity Credit) and confirmation of whether you have private drug insurance _____
26. Ontario residents: provide property tax or rent paid in the year (or indicate if lived in student residence) _____
27. Federal (and Quebec, if applicable) income tax instalment payments. Bring the statement you received in February 2022 showing the instalment payments made in 2021 _____
28. 2020 Notice of Assessment from the Canada Revenue Agency and (if Quebec resident) Minister of Finance. New clients, please provide your complete 2020 tax return (including schedules) _____
29. Provide a cheque marked VOID if you require direct deposit set-up with CRA/MRQ _____