

2022 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. 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 (F/S) _____
- 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 (in CAD) and sale, including selling costs _____
- 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 2022, if your share of original cost > \$100k CAD _____
- 10. Support payments received or paid with respect to child(ren) &/or former spouse _____
- 11. If you received salary/ commission and were required to pay expenses (auto, home office, or other) provide a list of expenditures and the mileage log (employer signed T2200 **required**), as well as the # days you worked from home due to COVID-19 _____
- 12. RRSP contributions. If applicable, include details of Past Service Adjustment Reversal, Home Buyer Plan or Lifelong Learning Plan. Provide details if you repaid COVID-19 program overpayments. _____
- 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 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 2022 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 2022 property tax or rent paid in the year, and cost of ON hotels/accommodation _____
- 27. Federal (and Quebec, if applicable) income tax instalment payments. Bring the statement you received in February 2023 showing the instalment payments made in 2022 _____
- 28. 2021 Notice of Assessment from the Canada Revenue Agency and (if Quebec resident) Minister of Finance. New clients, please provide your complete 2021 tax return (including schedules) _____
- 29. Provide a cheque marked VOID if you require direct deposit set-up with CRA/MRQ _____