

## **2023 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 2023, 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**) \_\_\_\_\_
12. RRSP/FHSA contributions. If applicable, include details of Past Service Adjustment Reversal, Home Buyer Plan, Lifelong Learning Plan or First Home Savings Account (FHSA). \_\_\_\_\_
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 taxable investment income, investment management 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 dependants \_\_\_\_\_
20. Multigenerational home renovation tax credit (MHRTC) – Up to \$50,000 of qualifying expenditures (date, vendor, HST number, description and amount) \_\_\_\_\_
21. Charitable donations and political donations (must provide official receipts) \_\_\_\_\_

- 22. Caregiver credit if support dependent with physical/mental impairment (specify their age, relationship to you, and their 2023 net income) \_\_\_\_\_
- 23. Interest paid on student loans (provide statement of interest paid) \_\_\_\_\_
- 24. 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 \_\_\_\_\_
- 25. Ontario residents: 2023 property tax or rent paid in the year \_\_\_\_\_
- 26. Federal (and Quebec, if applicable) income tax instalment payments. Bring the statement you received in February 2024 showing the instalment payments made in 2023 \_\_\_\_\_
- 27. 2022 Notice of Assessment from CRA and (if Quebec resident) Revenu Quebec  
New clients, please provide your complete 2022 tax return (including schedules) \_\_\_\_\_