

2024 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 2024, 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 & overnight camp fee receipts (name of provider, 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 2024 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: 2024 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 2025 showing the instalment payments made in 2024 _____
 27. 2023 Notice of Assessment from CRA and (if Quebec resident) Revenu Quebec New clients, please provide your complete 2023 tax return (including schedules) _____