

Personal Tax Organizer

Please see the list below to help gather the necessary information and documentation to file your tax return;

General Information - Please provide:

- Current contact info including full name, address, phone, email, etc.
- Your personal information including SIN, birthdate, etc. and your spouses & dependents info
- Life Events ie. Bought / Sold a house, marital status / name changes, new dependents, etc. (include dates & details)
- Direct Deposit information, if not already set up or bank changed (Void cheque)
- Did you sell your home or a vacation property ?

Income

- Employment Income (T4)
- Pension & Other Income (T4A, T4A(P), T4OAS, T4RIF, T4RSP)
- Investment Income (T5's)
- Employment Insurance Benefits (T4E)
- Details of the sale of securities such as stocks & bonds (ie. Realized gain / loss report from Broker), possible T5008 slips
- Trust Income such as mutual fund investments (T3's)
- Partnership Income (T5013)
- Professional, Business or Property (Rental) Income
- Spousal Support or Maintenance and alimony payments received as a result of a written agreement or court order
- Workers Compensation / Social Assistance Payments (T5007)
- Any other receipts of an income nature (e.g. Mortgage interest, broker's interest, annuities, foreign source income, etc.)

Deductions & Tax Credits

- RRSP Contributions, Labour Sponsored Fund Contributions (**Should be slips for tax year and first 60 days of current year**)
- Union and Professional Dues
- Child Care Expenses - include name, address and SIN of recipient
- Attendant Care Expenses - include name, address and SIN of recipient
- Non-reimbursed Moving Expenses if you moved 40 km or closer to work or carry out business
- Spousal Support payments made - Include Name & SIN of recipient
- Carrying costs related to investment income (ie. Accounting fees, investment consulting fees & interest)
- Details of expenses to earn commission income
- Details of any unreimbursed employment expenses (ie. Travelling or Auto expenses - Form T2200 Required)
- Adoption related expenses
- Tradesperson's tools acquired by an employee
- Charitable Donations & Political Contribution Receipts
- Medical Expenses, payments to a private health insurance plan
- Tuition Fees (Forms T2202 or TL11)
- Interest Paid on Qualifying Student Loans
- Disability Tax Credit - Acceptance letter from CRA (unless filed in previous return)
- Property Taxes or Residential Rent paid (include municipality paid to or name & address of Landlord)
- Legal fees paid to establish child or spousal support or to enforce a pre-existing agreement
- Home Improvement expenses to allow a senior to gain access to, or be more mobile/functional/safe within the home
- Volunteer Firefighters Certification and/or Search & Rescue Volunteer Certification
- Eligible Educator School Supply Tax Credit

Other Tax Information

- Tax installment payments made, if any
- Previous Year's income tax return, Notice of Assessment and other correspondence from the Canada Revenue Agency
- Details of Specified Foreign Property owned, if any (T1135)
- Details of Capital Gains and losses realized. Provide details of proceeds and adjusted cost of investments disposed of. This can usually be obtained by contacting your investment advisor
- Details regarding contributions and withdrawals from Registered Education Savings Plans
- Details regarding RRSP - Home Buyers' Plan withdrawals and repayments; RRSP - Lifelong Learning Plan repayment

*** Please note this list is only meant to assist you in gathering your information and is subject to change***