

## PERSONAL TAX ORGANIZER

2024

This checklist has been designed to help you gather information for your tax return.

Please review this checklist prior to bringing your documents in to our office. Tax credits and reporting requirements are constantly changing. This organizer will assist us in claiming all the tax deductions you qualify for and comply with reporting requirements.

## 1. Personal Information

Name		Date of birth (mm/dd/yy)		Phone
<b>Taxpayer</b>				<b>Home:</b>
<b>Spouse</b>				<b>Work:</b>
<b>Address</b>				<b>Cell:</b>
				<b>Cell:</b>
<b>Email</b>				
<b>Spouse Email</b>				

**Marital Status:**      Married      Single      Common-law      Separated      Divorced      Widowed

**Note: You are considered to be living common-law if you have been living with someone for 12 consecutive months or are living together and have a child.**

To best maximize credits, it is ideal that we prepare both parties tax returns.

Did your Marital Status Change during the year?      Yes      No

If yes complete [Section 13](#)

Are you a U.S. citizen, Green Card Holder, or were you, or your parents born in the U.S.?      Yes      No

Are you disabled? If yes, have you applied for the disability certificate (T2201)?      Yes      No

Do you own rental properties? If so refer to [Section 16](#)      Yes      No

Do you have employment expenses? If yes complete [Section 14](#)      Yes      No

Do you have self employment income? If yes complete [Section 15](#)      Yes      No

Consent to share contact information -Organ and tissue donor registry

Does the taxpayer authorize CRA to provide your name and email address to Ontario Health

(Trillium Gift of Life) so they may contact you or send you information about organ and tissue

donation      **If we do not have an email address for spouse or children we will answer NO for them**

**Name**      \_\_\_\_\_      Yes      No

**Name**      \_\_\_\_\_      Yes      No

## 2. Residence

Province or territory of residence on December 31 \_\_\_\_\_

**Did you sell your home during the year**

Yes

No

Address of the property \_\_\_\_\_

Year the property was purchased \_\_\_\_\_

Proceeds of disposition

Date sold

\$

MM/DD

**Did you sell your home less than 365 days after purchased?**

**Will be deemed to be business income unless a particular exception is met  
such as due to death, separation, birth, illness or employment change**

**Did you pay Property tax**

**Paid to: \_\_\_\_\_ Amount: \_\_\_\_\_**

Yes

No

**Did you pay Rent?**

**Attach receipts**

Yes

No

First time home buyer? - include statement for new home to claim home buyer's amount

Yes

No

## 3. Elections Canada

Are all persons listed above Canadian citizens?

Yes

No

If yes, the taxpayers authorize the CRA to provide their name, address and date of birth  
to Elections Canada to update their information on the National Register of Electors?

Yes

No

## 4. Foreign Reporting

Did the taxpayer own or hold foreign property with a total cost of more than  
CDN \$100,000 at any time during the year? Foreign property includes cash, stocks, trusts  
partnerships, real estate (other than for personal use) and an account with a Canadian  
securities dealer.

Yes

No

If yes, provide details and contact your financial advisor for applicable reports.

Yes

No

## 5. Dependents

Name	Relationship	SIN	Birthdate (mm/dd/yy)	Disability *

\* Has an application for disability certificate been completed?

Yes

No

## 6. General Income/Deductions

T4 slips - Employment income?

Yes

No

T4A - Commission, self-employment, scholarships, bursaries?

Yes

No

T4E - Employment insurance?

Yes

No

T5007 - Social assistance?	Yes	No
Employment income or taxable benefits not shown on T4 slip? e.g. Tips what	\$ _____	
Union and professional dues - If yes attach receipts.	Yes	No
List of child care expenses, with receipts, for each child.	Yes	No
Did you move during the year? - enclose receipts .	Yes	No
Did you incur employment expenses?	Yes	No
If yes, complete <a href="#">Section 14</a>		
Misc deductions? - Adoption, Clergy or tradesperson.	Yes	No

## 7. Pension Income

T4A - Pension, retirement and annuity income?	Yes	No
T4A(P) - Canada pension plan benefits?	Yes	No
T4A(OAS) - Old age security slip?	Yes	No
T4A(RCA) - Retirement compensation arrangements?	Yes	No
T4RSP - Registered retirement savings plan?	Yes	No
T4RIF - Registered retirement income fund income?	Yes	No
Does the taxpayer elect to split eligible pension income with his/her spouse or common-law partner?	Yes	No
Foreign pension? Attach supporting documents.	Yes	No

## 8. Investment Income/Deductions

T3 - Income from mutual funds? Please note: some may arrive late this year	Yes	No
T5 - Investment income?	Yes	No
T4PS - Income from profit sharing plans?	Yes	No
T5013 - Partnership income?	Yes	No
T5008 - Income from securities transactions?	Yes	No
Did you dispose of any property or investments during the year? (excl. RRSP TFSA)	Yes	No
If yes, provide details and contact your financial advisor for a " <a href="#">Realized Gains/Loss</a> " report		
Did you change your financial planner during the year?		
Interest to earn	_____	
investment income \$ _____	Management fees paid	\$ _____

## 9. RRSP/RRPP/T4FHSA Contributions

Slips for contributions attached?		
RRSP - Remainder of the 2024 year?	Yes	No
RRSP - 1st 60 days of 2025 (may be 2 slips)?	Yes	No
T4FHSA - 2024 slip?	Yes	No
Were any amounts repaid during the year to a home buyer's plan or a life long learning plan? Provide details	Yes	No

## 10. Children in University or College

T2202A - In most cases available on line via student portal.	Yes	No
In residence during the year?	Yes	No
Paid rent - Attach copy of receipt(s).	Yes	No
Does the student want to transfer unused tuition to parent or grandparent ?	Yes	No
If yes, specify: Student: _____ Transfer to: _____		
Student: _____ Transfer to: _____		
Student: _____ Transfer to: _____		

**If transferring, ensure the student signs the back of form T2202A**

## 11. Other Credits

Student Loan Interest? Attach documents	Yes	No
Medical expenses? - Prescriptions, <a href="#">ask Pharmacy</a> for printout of years purchases	Yes	No
- Dental, <a href="#">ask for printout</a> of years transactions	Yes	No
- Retirement or Nursing Home, attach receipt/letter	Yes	No
Health Benefit Premiums (if Yes , provide statement)	Yes	No
Out of Country Medical premiums - (If yes, provide statement)	Yes	No
Home Accessibility Tax Credit - Renovations to improve access and mobility	Yes	No
If yes include receipts - we will determine eligibility maximum \$20,000 for 2024 examples: wheel chair ramps, walk in tubs, grab bars		
Charitable donations? - Attach receipts.	Yes	No
Digital News Subscription Tax Credit Please provide receipts A non-refundable tax credit based on up to \$500 of amounts paid for a qualifying digital news subscription (primarily engaged in the production of original written news content)		
Canadian Training Credit A refundable tax credit may be available to reimburse up to half of eligible tuition and fees associated with work-related training for individuals aged 25 to 64 years old at the end of the year. Please provide details on tuition and other fees related to training		
Multigenerational Home Renovation Tax Credit - Did you renovate to enable a senior or adult eligible for the disability tax credit to live with a qualifying relation If yes attach receipts	Yes	No

## 12. Prior Year Tax Return Information and Correspondence

Is a copy of the Notice of Assessment for last year's tax return attached?	Yes	No
If new to the firm, are tax returns (and Notices of Assessments) for the last three years attached?	Yes	No
Copy of foreign tax returns filed attached?	Yes	No
If claimed a loss carryback in any of the preceding three years, are the Notices of Assessments for those years attached?	Yes	No
Is a copy of any other correspondence from the Canada Revenue Agency attached?	Yes	No
Is your statement of installments paid for last year attached? (included with your notice for the current year requirements, received in January)	Yes	No

## 13. Change in Marital Status

**Marital Status:**      Married                  Single                  Common-law                  Separated                  Divorced                  Widowed

Date Marital Status changed   mm/dd      \_\_\_\_\_

Note: You are considered to be living common-law if you have been living with someone for 12 consecutive months or are living together and have a child.

### If you became separated or divorced:

Did you receive or pay spousal and/or child support?	Yes	No
Is there a legal separation agreement? If yes enclose a copy	Yes	No
Incur legal costs to establish or enforce support payments received? If yes obtain a letter from your lawyer for deductible fees incurred.	Yes	No

**IF YOU DO NOT HAVE SELF-EMPLOYED INCOME, EMPLOYMENT EXPENSES OR RENTAL PROPERTIES YOU ARE FINISHED**

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## 14. Employment Expenses

Attach Form T2200, completed and signed by your employer.      Yes      No

Summarize eligible expenses as per the T2200 and include receipts.      Yes      No

Expense	Amount	Expense	Amount
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Did you use your personal car for employment?      Yes      No

If yes provide the information below and include receipts.

New car - purchase /lease document      Yes      No

Make/model of car      \_\_\_\_\_      Fuel      \_\_\_\_\_ 5 of 7

# of kilometers driven for employment	_____	Repairs & maint.	_____
Total # of kilometers driven in the year	_____	Insurance	_____
Interest on loan	_____	Lic. Plate renewal	_____
Lease payments	_____	CAA	_____

**Did you use space in your home as per your T2200?**

Yes No

Per CRA - The work space is where you mainly (more than 50% of the time) do your work.

Or you use the work space only to earn employment income. You also have to use it on a regular and continuous basis for meeting clients, customers, or other people in the course of your employment duties.

Square footage of space used	_____	Total square footage of home	_____
Electricity, heat and water	_____	Insurance (comm. employees only)	_____
Maintenance	_____	Rent	_____
Property taxes (comm. employees only)	_____		

## 15. Self-Employment/Business Income

**Are you registered for HST?**

Yes No

If yes and you are an annual filer, would you like us to prepare the remittance form?

Yes No

Provide documents, reports, Simply/QuickBooks file or receipts.

Yes No

**Did you use your personal car for business purposes?**

Yes No

If yes complete the summary below and provide all receipts

New car - purchase /lease document

Yes No

Make/model of car	_____	Fuel	_____
# of kilometers driven for business	_____	Repairs & maint.	_____
Total # of kilometers driven in the year	_____	Insurance	_____
Interest on loan	_____	Lic. Plate	_____
Lease payments	_____	CAA	_____

**Home office**

Yes No

Per CRA - The work space is your principal place of business (related to office duties)

Or you use the work space only to earn self- employment income. You also have to use it on a regular and continuous basis for meeting clients, customers, or other people.

Square footage of space used	_____	Total square footage of home	_____
Electricity, heat and water	_____	Insurance (comm. employees only)	_____
Maintenance	_____	Rent	_____
Property taxes	_____	Mortgage Interest	_____

**Internet business Activities:**

If you have a business or professional income, please indicate whether you have "Internet Business Activities" Yes      No

According to CRA, "Internet Business Activities" include any activity where you earn income from your websites or web pages. This can include:

- Selling goods and/or services on your own website or page. You may have a shopping cart and process payment transactions yourself or use a third party service.
- If your site doesn't support transactions but your customers call, complete and submit or email you to make a purchase order, booking etc. - excluding 'information only' webpages and websites like directories or ads.
- Selling goods and/or services on auction, marketplace or similar sites operated by others
- Earning income from advertising, income programs or traffic your site generates.

**If you have internet business activities, please also provide**

- Number of webpages or websites from where your business earns income. Please provide the addresses of your pages and/or sites. If you have more than 5, provide the 5 that generates the most income.
- Provide the percentage of income generated from the internet. If you do not know the exact percentage, please provide a reasonable estimate

# of websites/pages \_\_\_\_\_ % of revenue generated from the internet \_\_\_\_\_%

**Top 5 site/page addresses:**


**16. Rental Properties**

Do you own rental properties? If yes please refer to CRA Guide T4036 for reporting requirements Yes      No

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