

Personal Tax Return Organizer

Name:			
Address:			
	City:	Prov:	Postal Code:
Business Phone:		Home Phone:	
Email Address:		Cell Phone:	
SIN:		Date of Birth (d/m/y)	

How would you like to be contacted? E-mail Work phone Home phone Cell phone

Would you like to receive your tax return in electronic format (PDF copy uploaded to our secure client portal) or in full paper format?
 PDF on secure portal (default) Full paper copy

Would you like to receive your returned documents or tax return by courier (at no extra charge)? Yes (default) No
 If we are couriating the package to your home, can it be left in your mailbox if you are not home? Yes No

Please indicate where you would like us to courier the package to (couriers cannot be sent to Postal Boxes):
 Same address as above Different address (please complete box below)

Name & Address:			
City:	Prov:	Postal Code:	

US Citizen/Green Card Holder: Yes No

If yes, are we preparing a Canadian Tax return; a US Tax return; or both? CDN US Both

Marital Status: Married Divorced Single
 Widowed Separated Common Law

Did your marital status change in the year? If so date of change (d/m/y): _____

Are we also preparing a return for your spouse? Yes No

SPOUSAL INFORMATION:

Name		Net Income (line 23600) (Only if we are not preparing your spouse's return)	
SIN		Date of Birth (d/m/y)	

DEPENDANT CHILDREN:

Child's Name	Date of Birth (d/m/y)	Net Income	Attending University

Do you wish to enroll in the CRA Online Mail program? Yes No (if left unanswered, No will be selected automatically)
 Do you wish to sign up for direct deposit? Yes No (if Yes, please provide a voided cheque or direct deposit form)

Foreign assets with cost amount > \$100,000? Yes No
 Are you a beneficiary of a foreign trust? Yes No
 Self-Employed Individuals – GST/HST registrant? Yes No
 - Are we preparing the GST/HST return? Yes No
 Have you included a signed engagement letter? Yes No
 Do you own residential property as a trustee/partner? Yes No (if Yes, please contact us with the property details)

This question must be answered before your return can be e-filed.

Do you agree to the Canada Revenue Agency providing, over the next 12 months, your name, address, and date of birth to Elections Canada to help keep up to date your information currently on the National Register of Electors?
 Yes No (if left unanswered, NO will be selected automatically)

Personal Income Tax Return Checklist

***New for 2023:** Residential Property Flipping Rules – Profit from the sale of residential property (including principal residence) held less than 365 days will be fully taxable as business income and does not qualify for the principal residence exemption nor the 50% capital gain inclusion rate (some exceptions: death, marriage breakdown, involuntary disposition, change of job, bankruptcy, etc).

- T4 Slips - Employment income, tips
- T4A Slips - Pension, annuity, other income
- T4A(OAS) - Old Age Security income
- T4A(P) – Canada Pension Plan benefits
- T4E - Employment Insurance benefits
- T4RIF – Income from RRIF
- T4RSP – Income from RRSP
- *T4FHSA – Contributions/Income to/from First Home Savings Account (FHSA)
- T3012A – Withdrawal of RRSP or RRIF
- T4A-RCA – Distributions from retirement compensation arrangement
- T4PS – Income from profit sharing
- T5 - Bank interest or taxable dividends
- T3 - Statement of trust income
- T5007 – Statement of Benefits
- T5008 – See capital gains below
- T5013 - Statement of partnership income
- Capital gains/losses – sale proceeds, cost base, commissions **(including Crypto-Assets)**
- Employment Expenses
 - T2200 - Conditions of employment **(required prior to filing return)**
 - I will provide a summary of employment expenses including auto expenses (# of business KMs and personal KMs driven during the year), supplies, telecommunications, tradesperson tools, travel and entertainment and home office (see *Home Office Expenses (Detailed)* above)
 - Summary of home office expenses (rent/prop. taxes, utilities, maintenance, insurance, phone & internet, supplies)
 - Workspace Area _____ Total Area _____ (sq. ft.)
- Rental properties - revenue & expenses
(if bought or sold in the year please provide statement of adjustments and trust ledger)
- Summary of self-employment - revenues and expenses
- Sale of house – statement of adjustments, description, year of purchase, closing date:_____
- First Time Home Buyer – Closing Date:_____
- Repayments under the HBP or Lifelong Learning Plan (LLP)
- Moving expenses (receipts required for CRA review)
- Adoption expenses
- Union or professional dues
- Child care receipts (incl. SIN of caregiver)
- Alimony/Support/Child Support payments (incl. name and SIN of payer/recipient)
- Interest, broker expense & carrying charges
- RRSP contribution receipts
- Rent/Property Taxes paid in Ontario (incl. rent receipt or property tax statement)
- T2202 Tuition certificate (page 2 signed for transfers from children)
- Interest on government student loans
- Charitable donation receipts
- Political contribution receipts
- Digital News Subscription receipts
- Tax shelter information
- Public transit receipts (Ontario - If 65 or older)
- Medical receipts (claims > \$6,000 likely subject to CRA review)
- Are you or any family members disabled?
- Renovations to your home to improve accessibility?
- Are you a volunteer firefighter?
- Are you an eligible educator?
- Are you between 65 and 70 years of age, self-employed, and would like to opt-out of paying into CPP?
- Are you the trustee/beneficiary of a bare trust?
- Was there a death in the family? (Please ask for our Estate Organizer)
- Federal tax installments
 - 1) Federal:
 - 2) Provincial (QC only):
- Prior year's Notice of Assessment or Reassessment
- Copies of any Foreign tax filings and associated assessment

Is there anything else that you think we should know when preparing your return, or other comments about delivery, etc.?