



PERSONAL TAX ORGANIZER 2023 TAX YEAR

DISCLAIMER

This personal tax organizer is intended for Canadian resident taxpayers only. Information on provincial credits has been excluded.

The purpose of this personal tax organizer is to assist you in gathering the information/supporting documents we need to complete your personal income tax return and is in no way a comprehensive list of all the information of documentation we may need. Please complete the following sections to the best of your knowledge, and if you have any questions, please contact Heather Raso Chartered Professional Accountant P.C. at (905) 228-6932.

Name: _____	Spouse / Common-law partner: _____
SIN: _____	SIN: _____
Date of birth: _____	Date of birth: _____
Email address: _____	Email address: _____
Phone number: _____	Phone number: _____
Marital status: _____	
Address: _____	

Dependant's Name	Relationship	Date of Birth	SIN	Net Income	Prepare Return?

General Information	Self	Spouse
Are you a Canadian citizen?		
As a Canadian citizen, do you authorize the CRA to give your name, address, date of birth and citizenship to elections Canada to update the National Register of Electors?		
Are you a U.S. citizen or green card holder?		
Are you a Canadian tax resident? Please reach out to us if you don't know.		
Do you believe you have income that may be exempt under the <i>Indian Act</i> ?		
Was there a change in your marital status? If so, please provide date of change and a separation / divorce agreement.		
Are you registered for CRA's My Account?		
Are you registered for direct deposit with CRA? If not and you would like to be registered, please provide us with a void cheque or alternatively register directly using My Account or by calling the CRA individual taxpayer line at (800) 959-8281.		
Did you pay tax instalments to the CRA? If yes, please indicate the amount.		
At any time during the year, did you own foreign property with a total aggregate cost in excess of CAD \$100,000?		

General Information	Self	Spouse
Did you transact in cryptocurrency to purchase or sell goods and services?		
Did you or your spouse purchase a principal residence during the year? If so, were you first-time home buyers (i.e., you or your spouse have not owned a home in the last five years)?		
Are you a GST/HST registrant? If so, do you need us to file GST/HST returns for you?		
Are you up to date with your tax filings with CRA?		
Did you hold any property in trust for someone else's benefit during the year or were a co-signer on a mortgage? Please reach out if you are unsure.		
Are you required to file an Underused Housing Return? If so, do you need us to prepare this for you? Please reach out if you are unsure.		

For the following sections of this checklist, please tick off ("x") the boxes that apply to you, your spouse or dependants and send us the information requested in the relevant documents / slips column.

General Information	Self	Spouse	Dependants	Relevant Documents / Slips
Employment or commission income				T4 / T4PS and details of other benefits or employment income not on T4 slip
Scholarship or research grants				T4A
Employer profit sharing programs				T4PS
Stock option benefit from public or private companies				Statements as applicable
Severance package				T4 / T4A
Old age security pension				T4A(OAS)
Canada or Quebec Pension Plan benefits				T4A(P)
Other pensions or superannuation / RRSP Income and RRIF				T4A / T4RSP / T4RIF / T4A-RCA
U.S. social security benefits				Forms SSA-1042S and SSA-1099
Other foreign pension income				Foreign pension statements
Workers' compensation benefits				T5007
Employment insurance or maternity / parental leave benefits				T4E / T4A / T5007
Investment income (e.g., dividends, interest)				T5 / T3
Foreign income				T3 / T5 / 1099 / NR4 and year-end summaries, including any foreign tax paid
Foreign income verification report (T1135)				Provide details of foreign investments or summary from financial advisor
Limited partnership income				T5013
Rental property				Summary of income, expenses and asset additions
Realized capital gains / losses				T5008 / Gain - Loss summary reporting dates of sales and purchases, proceeds and cost
Disposition of principal residence				Year the home was purchased and sale price of the home.

General Information	Self	Spouse	Dependants	Relevant Documents / Slips
Disposition of rental property				Details including purchase and sale closing documents from law office(s).
Change in use (full or partial) in real estate properties (investment or personal)				Original cost and Fair Market Value of the property at the time of the change in use
Alimony payments made/received				Amount and separation agreement/divorce decree to support
Self-employed / sole proprietor business activities				Summary of income, expenses and asset additions as well as HST/GST number if applicable. Please also provide details of any COVID-19 subsidies or loans received.
Guaranteed income supplements, spouse's allowance, social assistance, workers' compensation payments				T4(OAS) / T5007 / Details
Disposition of private company shares				Details including ACB and proceeds. Indicate if the company was a Qualified Small Business Corporation. Please reach out if you are unsure.
Other: (please specify)				As applicable

Deductions / Credits	Self	Spouse	Dependants	Relevant Documents / Slips
Ontario Trillium Benefit				Total property taxes paid or rent receipts including name of landlord.
RRSP contributions				RRSP slips (include Dec 31 statements and contributions for the first 60 days of 2022)
Tax shelter investments				T5013 / T101 slips
Union or professional dues				T4 or receipts from Union
Child care expenses				Receipts, annual statements, eligible summer camp receipts
Attendant care expenses				Annual statement / summary of eligible expenses from nursing or retirement home
Moving expenses (for a new job or to study full time)				Summary of expenses / receipts
Investment counsel fees / carrying charges / interest				Annual statement / summary
Employment expenses, including GST/HST portion (e.g., car, home office)				Summary of expenses / receipts, signed T2200 from employer
Eligible educator school supplies				Summary of expenses / receipts, signed letter from employer
Home accessibility expenses				Summary of expenses / receipts
Adoption expenses				Summary of expenses / receipts
Tuition fees (self, spouse, dependants)				T2202 slips (signed back page by dependant if tuition transferred)
Student loan interest				Statement(s) of interest paid
Medical expenses other than amounts reimbursed				Receipts for expenses, including pharmacist or medical plan summary of amounts paid during the year.

Deductions / Credits	Self	Spouse	Dependants	Relevant Documents / Slips
Charitable donations				Official donation receipts – include details in schedule provided
Political contributions				Signed political contribution receipts
Digital news subscription				Official signed QCJO receipts