

Period ending: December 31, 2023

**T1 personal tax organizer**

Prepared by:	PPTO. 1

<b>Name:</b>		<b>Spouse / Common-law partner:</b>	
<b>SIN:</b>		<b>SIN:</b>	
<b>Date of birth:</b>		<b>Date of birth:</b>	
<b>Email address:</b>		<b>Email address:</b>	
<b>Phone number:</b>		<b>Phone number:</b>	
<b>Marital status:</b>			
<b>Address:</b>			
<b>Notes:</b>			

						<b>Prepare Return?</b>		
<b>Dependant's Name</b>	<b>Relationship</b>	<b>Date of Birth</b>	<b>SIN</b>	<b>Net Income</b>	<b>Yes</b>	<b>No</b>	<b>Notes</b>	

<b>General Information</b>	<b>Self</b>	<b>Notes</b>
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 Indian Act?		
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 please provide us with a void cheque or register directly using My Account or calling the CRA individual taxpayer line.		
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?		
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)?		

*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.*

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Income	Self	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 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		Form SSA-1042S and SSA-1099
Other foreign pension income		Foreign pension statements
Universal child care benefit		RC62 slip
Workers' compensation benefits		T5007
Employment insurance or maternity/parental leave benefits		T4E / T4A / T5007
Investment income (e.g., dividends, interest)		T3 / T5 / 1099 / NR4 and year-end summaries
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		Gain / loss summary reporting dates of sales and purchases, proceeds and cost
Disposition of principal residence		Details including date of sale and purchase, proceeds received and cost
Change in use (full or partial) in real estate properties (investment or personal)		Summary of cost and fair value of the property at the time of the change in use
Alimony or separation payments received		Amount and separation agreement to support
Self-employed/sole proprietor business activities		T4A / Summary of income, expenses and asset additions as well as HST/GST number. Please also provide details of any COVID-19 subsidies or loans received.
Guaranteed income supplements, spouse's allowance, social assistance, workers' compensation payments		T4A (OAS) / T5007 / Details
Prior year GST rebate		Prior year Notice of Assessment
COVID-19 benefits, including: Canada Recovery Benefit (CRB), Canada Recovery Sickness Benefit (CRSB), and Canada Recovery Caregiving Benefit (CRCB)		T4A

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Other: (please specify)		
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<b>Deductions / Credits</b>	<b>Self</b>	<b>Relevant Documents/Slips</b>
Pension contributions		T4 / T4A slips
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 Payment information (receipts)
Child care expenses		Receipts, annual statements, T4 of child care provider, eligible summer camp receipts
Attendant care expenses		Annual statement / summary of eligible expenses from nursing or retirement home
Allowable business investment losses		Details as applicable
Moving expenses (for a new job or to study full time)		Summary of expenses / receipts
Alimony or separation allowance		Amount and separation agreement support
Investment counsel fees/carrying charges/interest		Annual statement/summary
Employment expenses, including GST/HST Portion (e.g., car, home office) other than working at home due to COVID-19		Summary of expenses / receipts, signed T2200 from employer
Home office expenses for employees working from home due to COVID-19		
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 of interest paid
Medical expenses other than amounts reimbursed		Summary of expenses, including pharmacist or medical plan summary of amounts paid during the year, if available
Charitable donations		Official donation receipts – include details in schedule provided
Political contributions		Signed political contribution receipts
Digital news subscription		Official signed QCJO receipts
Other: (please specify)		