



Sheila Hanson  
ACCOUNTING INC.  
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Address: 201-6981 E Saanich Road

Office Hours: Mon-Fri 9am – 4pm

Contact email: [admin@sheilahanson.ca](mailto:admin@sheilahanson.ca)

## PERSONAL TAX ORGANIZER

For the year 2023

Please complete this personal tax organizer and attach all applicable slips, receipts, lists, and other supplemental information. Drop off at:

Address: 201-6981 E Saanich Road

Office Hours: Mon-Fri 9am – 4pm

Please note that once your personal tax package is received by our office, any additional information added may result in a refiling fee.

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## 1. Personal Information

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Name		SIN	Date of Birth (dd/mm/yy)	Phone	
				Office	Ext.
Taxpayer					
Spouse					
Address				Home:	
				Mobile:	
Email:					

Marital Status:

Married  Single  Common-law  Separated  Divorced  Widowed

If your marital status changed in 2023, provide date of change (dd/mm/yy): \_\_\_\_\_

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## 2. Residence

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

Did the taxpayer immigrate to Canada or emigrate from Canada during the year?  Yes  No

If yes, provide date of entry into Canada \_\_\_\_\_ or date of departure \_\_\_\_\_

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## 3. Elections Canada

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Is the taxpayer a Canadian citizen?  Yes  No

If yes, the taxpayer authorizes the CRA to provide his/her name, address and date of birth to Elections Canada to update his/her information on the National Register of Electors.  Yes  No

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## 4. Foreign Reporting – T1135

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Did the taxpayer own or hold foreign property with a total cost between CAD\$100,000 and CAN\$250,000 at any time during the year?  Yes  No

Did the taxpayer own or hold foreign property with a total cost of more than CAN\$250,000 at any time during the year?  Yes  No

If yes, please provide us with a list and all relevant details.

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## 5. Change in Personal or Financial Situation During the Year

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Date the taxpayer declared bankruptcy during the year: \_\_\_\_\_

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## 6. Dependents

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Name	Relationship	Date of Birth (dd/mm/yy)	SIN	Physically or Mentally Infirm?	Income	Child Care Expenses

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## 7. General Income/Deductions

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- T4 slips – Employment Income?  Yes  No
- T4A – Commission and self-employment?  Yes  No
- T4A – Recipient of Canada Worker Lockdown Benefit (CWLB)?  Yes  No
- T4E – Employment insurance?  Yes  No
- T5007 – Social assistance?  Yes  No
- Employment income or taxable benefits not shown on the T4 slip?  Yes  No
- Provide us with the amount paid for union and professional dues as well as the names of the organizations? \_\_\_\_\_
- List of child care expenses, with receipts, for each child?  Yes  No
- List of moving expenses paid?  Yes  No
- List of spousal support payments made or received?  Yes  No
- List of deductible employment expenses? **(Must include T2200)**  Yes  No
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## 8. Pension Income

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- T4A – Pension, retirement and annuity income?  Yes  No
- T4A (P) – Canada pension plan benefits?  Yes  No
- T4A (OAS) – Old age security pension slip/foreign pensions?  Yes  No
- T4A-RCA – Retirement compensation arrangements?  Yes  No
- T4RSP – Registered retirement savings plan income?  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

## 9. Investment Income/Deduction

T3 – Income from trust allocation?  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 the taxpayer dispose of property or investments (including a principal residence) during the year? If so, provide the following details in a separate list:

Description of Property & Quantity	Date Acquired	Date Disposed of	Sales Proceeds	Cost	Expenses for Disposal

Interest paid to earn investment income \_\_\_\_\_ Management fees \_\_\_\_\_ Accounting/legal fees \_\_\_\_\_

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## 10. Self-Employment/Business Income

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Financial statement(s)/ schedule of revenue and expenses attached?  Yes  No

Has the taxpayer registered to be eligible for Employment Insurance special benefits?  Yes  No

If an owner/manager, did the taxpayer has a shareholder loan outstanding during the year?  Yes  No

If yes, provide details of borrowings, repayments, and year-end balance if owner/manager owes the company money:

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If the taxpayer used a vehicle for business, are the vehicle expenses and both total and business mileage attached?  Yes  No

If the taxpayer used a portion of his/her home for business, are the home expenses and both total and business square footage attached?  Yes  No

Is a list of all asset additions and disposals (including cars equipment, etc.) attached?  Yes  No

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## 11. Rental Income

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If the taxpayer owned rental property, is a statement of rental income attached?  Yes  No

Statement of rental income should include:

- Total rental income for the rental unit
- All associated rental expenses (such as mortgage interests, property taxes, utilities, etc.)

Does the taxpayer also live in the rental property (in which case no CCA should be claimed)?

Yes  No

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## 12. RRSP/pool registered pension plan (PRPP) Contributions

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T-slips for contribution made attached?  Yes  No

Were there any amounts repaid during the year to a home buyers' plan or a lifelong learning plan?

Yes  No

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## 13. Other Credits

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T2202 – Tuition/education amount for taxpayer?  Yes  No

T2202 – Tuition/education amount claimed on transfer from dependent?  Yes  No

Receipt or amount for taxpayer's student loan interest?  Yes  No

Receipts/listing of all medical expenses paid in the year for taxpayer, spouse, and dependents?  Yes  No

First-time making charitable donations?  Yes  No

Receipts for charitable donations or donations made by way of gifting an item in kind?  Yes  No

Were any loans associated with the charitable donations?  Yes  No

Receipts for political contributions?  Yes  No

List of eligible teaching supplies purchased (for teacher and early childhood educators only)?  Yes  No

Information pertaining to the purchase of a new home to claim the first time home buyers' amount?  Yes  No

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## 14. Prior Year Tax Return Information/Correspondence

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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 corresponding Notice of Assessment) for the last three years attached?  Yes  No

If taxpayer claimed a loss carryback in any of the preceding 3 years, are the Notices of Reassessment for those years attached?  Yes  No

Is a copy of any other correspondence from the Canada Revenue Agency attached?  Yes  No

If you would like your tax refund deposited directly into your account and if you have not already registered for direct deposit, is a void cheque attached?  Yes  No

Is your statement of instalments paid for the year attached?  Yes  No

If you have any questions, please kindly email your question to:

[admin@sheilahanson.ca](mailto:admin@sheilahanson.ca)

Once your tax return is prepared, we will contact you for pick up.