



Address: 201-6981 E Saanich Road

Office Hours: Mon-Fri 9am – 4pm

Contact email: admin@sheilahanson.ca

PERSONAL TAX ORGANIZER

For the year 2024

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.

1. Personal Information

| 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 2024, provide date of change (dd/mm/yy): _____

2. Residence

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 _____

3. Elections Canada

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

4. Foreign Reporting – T1135

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.

5. Change in Personal or Financial Situation During the Year

Date the taxpayer declared bankruptcy during the year: _____

6. Dependents

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

7. General Income/Deductions

- 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
-

8. Pension Income

- 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 _____

10. Self-Employment/Business Income (Sole Prop/Partnership)

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 have 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:

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

11. Rental Income

If the taxpayer owns a 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

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

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

13. Other Credits

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

14. Prior Year Tax Return Information/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 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

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