



EVERYTHING FINANCIAL GROUP

Results Driven by Guidance, Performance and Strategy

Personal Tax Organizer: 2023

Personal Information:

	Name	SIN	DOB (YY/MM/DD)	Phone
Taxpayer:				
Spouse/Partner:				
Dependents:				

Address: _____ Email: _____

Marital Status: Single Married Common-law Separated Divorced Widowed

If your marital status changed during the year, provide date of change (MM/DD): _____

Elections Canada:

Do you authorize CRA to provide your name, address and date of birth to Elections Canada? Yes or No

Foreign Reporting:

Did you own foreign property of more than \$100,000 at any time during the year? Yes or No

Did you own an interest in a foreign affiliate at any time during the year? Yes or No

Other Information:

Please provide prior year's tax return and last year's **if this is your first filing with EFG.**

Did you immigrate/emigrate from Canada during the year? Yes If yes, provide date: _____

Did the taxpayer become deceased during the year? Yes If yes, provide date: _____

Does the taxpayer or dependent qualify for the DTC
(Disability tax credit) Yes

Did the taxpayer or spouse sell a property during the year? Yes Was this your principal residence? Yes

Did you apply for the First Time Home Buyer Grant? Yes

Did you apply for a Life-Long Learning Grant? Yes

Employment Income:

T4 Employment Income Yes Taxable benefits not shown on slips? Yes
T4E Employment Insurance Income Yes If yes, describe: _____
T4PS Employee Profit Sharing Plan? Yes
Did you pay union/professional dues? Yes
Are you claiming deductible employment expenses? Yes If yes, provide a **signed T2200**

*Complete the **Statement of Employment Expenses form (T777)**

Were you Self-Employed? Yes If yes, provide expense details

*Complete the **Statement of Business or Professional Activities form (T2125)**

Pension / Retirement Income:

T4A Pension, annuity and other income
T4A (OAS) Old Age Security
T4A (P) Canada Pension Plan
T4RIF Retirement Income Fund
T4RSP Retirement Savings Plan

Other:

T5007 Workers' Compensation Benefits
T5007 Social Assistance Payments
 Foreign Pension Income

Investment Income:

T3 Trust Income (Interest/Dividends)
T5 Interest/Dividends
T5008 Securities Transactions
T5013 Partnership Income

RRSP:

Did you make any contributions during the year? Yes
*Provide **ALL** official RRSP slips

Tax Instalments:

Did you make any tax (or GST) installments during the year? Yes

*If yes, provide detail

Self-Employment/Rental Income:

Do you have Business or Rental Income? Yes

*Complete the **Statement of Business or Professional Activities form**

*Complete the **Statement of Rental Income form**

Other Deductions:

Investment Management Fees (Annual Report) Charitable Donations (slips) Political Donations (slips)
 Investment Loan Interest (Dec 31st Statement) Medical Expenses (Total) Interest On Student Loan
 Childcare expenses (official receipts) Moving Expenses (Form T1M)
 Child Support/Spousal Support Tuition Slip (T2202)

Additional Info:
