

PERSONAL TAX ORGANIZER 2025 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 and supporting documents we need to complete your personal income tax return. Please complete the following sections to the best of your knowledge, and if you have any questions, please contact [insert accountant name and contact information].

Name:	_____	Spouse / 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.		

General Information	Self	Spouse
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?		
Do you own shares or units of non-publicly traded foreign corporations, partnerships or trusts? Please reach out if you are unsure.		
Are you a beneficiary of a foreign trust? Please reach out if you are unsure.		
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 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	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

General Information	Self	Spouse	Relevant Documents / Slips
U.S. social security benefits			Forms 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)			T4 / T4PS and details of other benefits or employment income not on T4 slip
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
Disposition of rental property			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
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	Relevant Documents / Slips
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
Spousal / Child Support			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)			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 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
Political contributions			Signed political contribution receipts