

St. Arnaud Pinsent Steman Chartered Professional Accountants

PERSONAL INCOME TAX ORGANIZER

Please use this checklist to gather and update your personal income tax information.

Self		Spouse, if applicable
Name		
SIN		
Email		
Mobile phone		
Other phone		
Date of birth		
Address		
Marital Status	Single ☐	Married ☐ Common Law ☐ Widowed ☐ Separated ☐ Divorced ☐
Has your marital status changed? If yes, please provide the date of change.		Date
Completed Tax Return to be	Mailed ☐	Emailed ☐ Picked Up ☐
Has your direct deposit information changed?		Yes ☐ No ☐

Name of Dependant	Date of Birth	Social Insurance Number (SIN)	Net Income (if any)

Please complete all the applicable boxes below.
Indicate the number of slips enclosed for each item.

INCOME					
	T3	Trust income		T5008	Statement of security transactions / trades
	T4	Employment income			Capital gains or losses
	T4 OAS	Old Age Security			Mineral exploration tax credits
	T4 P	Canada or Quebec Pension			Alimony / maintenance received
	T4E	Employment Insurance benefits			Child support received
	T4 RIF	RRIF Income			Business income and expenses
	T4 RSP	RRSP Income			Farming earnings Information
	T4A	Pension, annuity & other income			Rental income (Full Details Required)
	T4A	Scholarship / Bursaries / RESP			Short-term rental income (< 90 day rentals)
	T5	Investment income			Digital platform / internet business revenues
	T5007	WCB Benefits or Alberta Senior's Benefits			Cryptocurrency transactions
	T5013	Limited partnership income			Other – Please specify:
DEDUCTIONS (amount, or ✓ if applicable)					
	T2202A	Tuition fees / receipts			Interest on investment loans
	T2200 / S	Declaration of Conditions of Employment ¹			Investment counsel fees
	TL2	Claim for board and lodging expense			Political contribution receipts
		Alimony / maintenance paid			RRSP contribution receipts to Feb 28 2025
		Deductible child support paid			First Home Savings Account contribution receipts
		Allowable Business Investment Loss			Home renos for disability or multigenerational suite
		Child care expenses			Tradeperson's tool expense
		Disability deductions for self or dependants			Apprentice mechanic tools expense
		Donation receipts			Educator school supplies
		Adoption expenses			Union or professional dues
		Employment expenses			Volunteer firefighter or SAR credits
		Interest on student loans			Personal support worker tax credits
		Medical expenses			Tax installments paid: \$
		Moving expenses			Other – please specify:

¹ Required in order to deduct vehicle or home office employment expense

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PERSONAL PROPERTY

Personal property includes primary residence, recreational and rental property.

At any time during the year, did you sell your primary residence? If yes, provide a copy of purchase and sale documents.	Yes	☐	No	☐
Purchase amount _____, sale amount _____ Original purchase date _____				
Did you purchase a home which might qualify for the First Time Home Buyer tax credit?	Yes	☐	No	☐
At any time during the year, did you sell a secondary or recreational home? (eg: cabin) If yes, provide a copy of purchase and sale documents.	Yes	☐	No	☐
Purchase amount _____, sale amount _____				
At any time during the year, did you sell your rental property? If yes, provide a copy of purchase and sale documents.	Yes	☐	No	☐
Purchase amount _____, sale amount _____				
At any time during the year, did you sell any personal-use property for a gain? (eg: cars, boats, artwork, coins, stamps, etc) If yes, provide a copy of purchase and sale documents.	Yes	☐	No	☐
Purchase amount _____, sale amount _____				
Are you holding any property on behalf of another person or corporation?	Yes	☐	No	☐
Do you own property in British Columbia?	Yes	☐	No	☐

FOREIGN PROPERTY

Foreign property includes foreign bank accounts, shares and debt of foreign corporations and real estate held for rental, but excludes foreign assets held in an RRSP and personal use property.

At any time during the year, did you own foreign property with a cost greater than \$100,000?	Yes	☐	No	☐
At any time during the year, did you own real estate that was used for <u>other than personal use</u> ? eg. rental property	Yes	☐	No	☐
If yes, what is the current value of the property?				
At any time during the year, did you transfer or loan property or funds to a non-resident trust?	Yes	☐	No	☐
At any time during the year, did you receive funds or property from a trust nonresident in Canada in which you were a beneficiary?	Yes	☐	No	☐
At any time during the year, were you indebted to a trust nonresident in Canada in which you were a beneficiary?	Yes	☐	No	☐
Do you own or did you acquire shares of a foreign affiliate during the year?	Yes	☐	No	☐
Are you or your spouse a United States citizen or green card holder?	Yes	☐	No	☐
If yes, description and location of asset(s):				

Please use this space to provide additional information or notes.
