

2024 INCOME TAX ORGANIZER

Primary Filer Information	
First Name:	
Last Name:	
SIN:	
Date of Birth (DD-MM-YYYY):	
Gender:	
Phone Number:	
Email Address:	
Do you wish to be registered for CRA's Online Mail? YES / NO / Already Registered	
Home Address: (Current)	
Did you move in 2024?	YES / NO
If YES, please indicate your old address:	
Was this move at least 40km closer to your new place of work? YES / NO	
If YES, please provide us copies of all your expenses related to the move.	

Spouse / Partner Information	
First Name:	
Last Name:	
SIN:	
Date of Birth (DD-MM-YYYY):	
Gender:	
Phone Number:	
Email Address:	
Do you wish to be registered for CRA's Online Mail? YES / NO / Already Registered	
What is your current marital status? Please circle one.	
1. Married	2. Living common-law
4. Divorced	5. Separated
3. Widowed	6. Single
Was a change in marital status in 2021? YES / NO	
If YES, please indicate the date (DD-MM-YYYY) _____ of the change and indicate your new status below.	
1. Married	2. Living common-law
4. Divorced	5. Separated
3. Widowed	6. Single

Dependent	
Name:	
SIN:	
Date of Birth (DD-MM-YYYY):	
Gender:	
Net Income:	
Tuition:	YES / NO
If YES, please verify if the dependent is transferring tuition credit to parents: YES / NO	
Caregiver:	YES / NO
If YES, please include childcare receipts.	
Has this child lived with you throughout the year? YES / NO	
Disability Amount:	YES / NO

Dependent	
Name:	
SIN:	
Date of Birth (DD-MM-YYYY):	
Gender:	
Net Income:	
Tuition:	YES / NO
If YES, please verify if the dependent is transferring tuition credit to parents: YES / NO	
Caregiver:	YES / NO
If YES, please include childcare receipts.	
Has this child lived with you throughout the year? YES / NO	
Disability Amount:	YES / NO

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SIN:	
Date of Birth (DD-MM-YYYY):	
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Net Income:	
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SIN:	
Date of Birth (DD-MM-YYYY):	
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Net Income:	
Tuition:	YES / NO
If YES, please verify if the dependent is transferring tuition credit to parents: YES / NO	
Caregiver:	YES / NO
If YES, please include childcare receipts.	
Has this child lived with you throughout the year? YES / NO	
Disability Amount:	YES / NO

ATTENTION!!!

If you are not a first-time filer, please provide your Notice of Assessment and/or Reassessment from Previous Tax Year.

Additional Information

Please answer 'yes' or 'no' to the following, unless indicated otherwise.

Are you a Canadian Citizen? YES / NO

As a Canadian citizen, do you authorize the Canada Revenue Agency to give your name, address, date of birth, and citizenship to Elections Canada to update the National Register of Electors?
YES / NO *This must be answered before your return can be e-filed.

Are you new to Canada (did you arrive in 2024)? YES / NO

If yes, on which date did you arrive? (DD-MM-YYYY) _____

Did you pay rent in 2024? YES / NO

If YES, please provide all the addresses you had in 2021 as well as the rent amount and landlord name for each.

Did you pay tuition fees in 2024? YES / NO

If YES, please provide a copy of your T2202.

Did your employer provide you a T2200 Declaration of Conditions of Employment? YES / NO

If YES, please provide a copy and complete the section below for Home Office Expenses.

Total Home Sq. Ft. _____ Office Sq. Ft. _____

Office Expense	Amount	Office Expense	Amount
Gas	\$ _____	Mortgage Interest	\$ _____
Electricity	\$ _____	Property Taxes	\$ _____
Water	\$ _____	Other: _____	\$ _____
Repairs/Maintenance	\$ _____	Other: _____	\$ _____
Rent	\$ _____	Other: _____	\$ _____

Did you contribute to RRSP? YES / NO

If YES, please provide all contributions slips and the total amount contributed \$ _____
What is your 2024 deduction limit shown on your 2023 Notice of Assessment: \$ _____
Did you contribute to a Spousal RRSP Plan? YES / NO

Did you contribute to FHSA? YES / NO

If YES, please provide all contributions slips and the total amount contributed \$ _____

Do you have foreign assets greater than \$100,000 CAD?

Do you have foreign investment in your portfolio? YES / NO
If YES, please provide us with your statements, a T1135 must be completed (attached to email).

Have you or your spouse acquired a home during the year and have NOT lived in a home that you or your spouse have owned in the preceding 4 year (Are you considered a first-time home buyer)? YES / NO

Will you be claiming the Disability Tax Credit? YES / NO

If YES, is this a first-time claim? YES / NO

Have you had a change of employment this past year? YES / NO

If YES, do you have all your T4s? YES / NO

*If you do not have all your T4s, please follow-up with your previous employer or CRA to get the missing T4s.

2024 INCOME TAX CHECKLIST

T-Slips

- | | |
|---|--|
| <input type="checkbox"/> T3: Statement of Trust Income | <input type="checkbox"/> T600: Bond Interest Coupons |
| <input type="checkbox"/> T4: Employment Income, Tips | <input type="checkbox"/> T5007: Statement of Benefits (Worker's comp) |
| <input type="checkbox"/> T4A: Pension, Annuity, Other Income | <input type="checkbox"/> T5008: Investment Income |
| <input type="checkbox"/> T4A (OAS): Old Age Security Income | <input type="checkbox"/> T5013: Statement of Partnership Income |
| <input type="checkbox"/> T4A (P): CPP Benefits | <input type="checkbox"/> T2200: Declaration of Condition of Employment |
| <input type="checkbox"/> T4E: Employment Insurance Benefits | <input type="checkbox"/> T2201: Disability Tax Credit Certificate |
| <input type="checkbox"/> T4RIF: Proceeds from RRIF | <input type="checkbox"/> T2202: Education Amount Certificate |
| <input type="checkbox"/> T4RSP: Proceeds from RRSP | (For Self and/or Dependents) |
| <input type="checkbox"/> T5: Bank Interest or Taxable Dividends | <input type="checkbox"/> R8: Relevé 8 Tuition (QC Only) |
| <input type="checkbox"/> R1: Relevé 1 (QC only) | |

Receipts & Other

- ☐ Notice of Assessment and/or Reassessment from Previous Tax Year
- ☐ RRSP Contribution Receipts
- ☐ FHSA Contribution Receipts
- ☐ Union or Professional Dues Receipts
- ☐ Interest Expense
- ☐ Safety Box Fees
- ☐ Medical and Dental Receipts, Medical and Dental Premiums Paid
- ☐ Charitable and Political Donation Receipts
- ☐ Child Care Receipts
- ☐ Interest on Student Loans
- ☐ Tax Installments Paid During the Year Statement/Receipts
- ☐ Moving Expenses – All supporting documents
- ☐ Rental Apartment Receipt
- ☐ Relevé 31: Property occupancy (QC only)
- ☐ VOID Cheque for Direct Deposit Setup

Date:

Signature: