

Your Personal Tax Organizer

Additional items included (tick boxes as needed)

Other Slips:

- | | |
|--|--|
| <input type="checkbox"/> Other T4 Slips Employment Income | <input type="checkbox"/> T3 Slips Investment Income |
| <input type="checkbox"/> T4A Slips Commission and self-employment | <input type="checkbox"/> T4E Employment Insurance |
| <input type="checkbox"/> T5007 Social Assistance | <input type="checkbox"/> T5013 Partnership Income |
| <input type="checkbox"/> T5008 Income from Securities Transactions | <input type="checkbox"/> T4RSP Withdrawals from RRSP |
| <input type="checkbox"/> T4PS Income from Profit Sharing Plans | <input type="checkbox"/> T4RIF RRIF Income |

Other Income:

- Rental Income and Expenses
- Summary of Business Use of Home expenses
- Self Employment Business Income and Expenses

Sales

- Did you sell any real estate in the year? Please provide information
- Did you sell any stocks/bonds/mutual funds? Please provide investment information
- Did you dispose of any other assets? Please provide information

Pension Income:

- | | |
|---|--|
| <input type="checkbox"/> T4A Pension Income | <input type="checkbox"/> T4AP CPP Income |
| <input type="checkbox"/> T4RIF Retirement Income Fund | <input type="checkbox"/> T4OAS Old Age Security Income |

Capital Gains:

- Investment Account transactions for dispositions of investments
- Purchase and sale documents for dispositions of property

Deductions:

- | | |
|---|--|
| <input type="checkbox"/> Moving Expenses | <input type="checkbox"/> Child Care Expenses |
| <input type="checkbox"/> Accounting Fees | <input type="checkbox"/> Safety Deposit Box Fees |
| <input type="checkbox"/> Support Payments made or received | |
| <input type="checkbox"/> Deductible employment expenses (T2200 signed by employer) | |

Tax Credits:

- | | |
|--|---|
| <input type="checkbox"/> Student Loan Interest Statement | <input type="checkbox"/> Receipts for medical expenses |
| <input type="checkbox"/> Donation Receipts | <input type="checkbox"/> Tickets for Public Transit |
| <input type="checkbox"/> Children's Arts Tax Credit | <input type="checkbox"/> Children's Fitness Tax Credit |
| <input type="checkbox"/> First time Home Buyers Tax Credit | <input type="checkbox"/> Receipts for Political Contributions |
| <input type="checkbox"/> T2202 Tuition Tax Credits (if transferred to/from a child/parent, please ensure the form is signed by the dependent) | |