

PERSONAL TAX ORGANIZER

FOR THE YEAR 2023



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Camrose, AB T4V 0M6
Phone: 780-672-2600
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Please print and bring the form to our office.
Or scan and email it to info@grmcpa.ca

1. Personal Information

	Name	Phone	Cell	Email
Taxpayer				
Spouse				
Address				

Marital Status Married Single Common-law Separated Divorced Widowed

If married or common-law, are we preparing both returns? Yes No

If no, we require the net income of your spouse's current income tax return

Date of change in marital status if changed in the current year

2. Dependants

Name	Relationship	Date of birth (MM/DD/YYYY)	SIN	Income	Child Care Exp	Child Care Provider	Child Care SIN or BN

3. Elections Canada

Is the taxpayer a Canadian citizen?

Taxpayer Spouse

Y/N Y/N

4. Foreign Reporting

Did the taxpayer own or hold foreign property or investments with a total cost of more than CDN \$100,000 at any time during the year? If yes, please provide list.

Taxpayer Spouse

Y/N Y/N

5. Bare trust

Have you received and read our letter/email?

Do any of the scenarios in the letter/email apply to you?

If so, please attach requested information for the trustees, beneficiaries and settlors.

Y/N Y/N

Y/N Y/N

6. Principal Residence

Any disposals of a principal residence during the year?

If yes, please provide the year of acquisition, the proceeds and the property description.

If not a principal residence for every year owned, please advise us.

Yes No

7. Students (Taxpayer or Dependant)	Taxpayer	Spouse
T2202 - Tuition amount attached?	Y/N	Y/N
Receipts for government student loan interest attached?	Y/N	Y/N
8. General Income	Taxpayer	Spouse
T4 slips - Employment income attached?	Y/N	Y/N
T4A slips - Commission and self-employment attached?	Y/N	Y/N
T4E slips - Employment Insurance Benefits attached?	Y/N	Y/N
List of support payments made or received attached?	Y/N	Y/N
Details of any other income attached?	Y/N	Y/N
9. Pension Income	Taxpayer	Spouse
T4A slips - Pension, retirement and annuity income attached?	Y/N	Y/N
T4A(P) slips - Canada Pension Plan benefits attached?	Y/N	Y/N
T4A(OAS) slips- Old Age Security income attached?	Y/N	Y/N
T4RSP/T4RIF slips - Other pension income attached?	Y/N	Y/N
T5007 slips - Social assistance attached?	Y/N	Y/N
Does the taxpayer elect to split eligible pension income with his/her spouse or common-law partner?	Y/N	Y/N
10. Investment Income	Taxpayer	Spouse
T3 slips - Statement of trust income attached?	Y/N	Y/N
T5 slips - Statement of investment income attached?	Y/N	Y/N
T5013/T5013A - Statement of partnership income attached?	Y/N	Y/N
T5008 - Statement of security transactions attached?	Y/N	Y/N
Any disposals of property, stocks, bonds etc. during the year?	Y/N	Y/N
If yes, please provide the following details and documents for "each" piece of property, stock or bonds sold:	Y/N	Y/N
- Description of property, stock or bonds	- Sale proceeds	
- Date acquired	- Date of disposal	
- Original cost	- Expenses of sale	
11. Rental income	Taxpayer	Spouse
Summary of revenue and a list of expenses attached?	Y/N	Y/N
List of auto expenses incurred for business activity and totals for both personal and business mileage for the year attached?	Y/N	Y/N
Meals and entertainment amount included in list of expenses attached?	Y/N	Y/N
Invoices for capital expenditures in the year attached?	Y/N	Y/N
Details of proceeds of disposals (and original cost) of any capital assets sold or traded attached?	Y/N	Y/N
12. Business, Commission or Professional Income	Taxpayer	Spouse
Schedule of revenue and expenses attached?	Y/N	Y/N
Government (federal or provincial) subsidy applied for during the year?	Y/N	Y/N
Invoices for capital expenditures in the year attached?	Y/N	Y/N
Details of proceeds of disposals (and original cost) of any capital assets sold or traded attached?	Y/N	Y/N
Office in home expenses attached (only if you have no business location)?	Y/N	Y/N

13. Farming income	Taxpayer	Spouse
Details of income and expenses attached?	Y/N	Y/N
AGR-1 slips - Statement of Farm Payments attached?	Y/N	Y/N
T4A slips - patronage payments attached?	Y/N	Y/N
Government (federal or provincial) subsidy applied for during the year?	Y/N	Y/N
Invoices for capital expenditures in the year attached?	Y/N	Y/N
Details of proceeds of disposals (and original cost) of any capital assets sold or traded attached?	Y/N	Y/N
Details of grain advances, repayments in the year and the year end statement attached?	Y/N	Y/N
Details on inventory on hand at December 31 (should not include deferred grain sales)?	Y/N	Y/N
Details of purchased inventory included in inventory listing?	Y/N	Y/N
Were there any land acquisitions or disposals? Attach the Statement of Adjustment from lawyer and the breakdown of purchase price between land and building.	Y/N	Y/N
Participating in AgriInvest?	Y/N	Y/N
Participating in AgriStability?	Y/N	Y/N
Details of proceeds for access by pipeline, seismic etc.?	Y/N	Y/N

14. Other Deductions or Credits Enclosed	Taxpayer	Spouse
RRSP / FHSA contribution receipts attached?	Y/N	Y/N
Union/professional dues receipts attached?	Y/N	Y/N
T2200 Declaration of conditions of employment (signed by employer) attached?	Y/N	Y/N
TL2 - meals and lodging expenses (signed by employer) attached?	Y/N	Y/N
Receipts to support apprentice/trade person's tools attached?	Y/N	Y/N
Receipts to support teacher's school supplies attached? A certificate from your employer attesting to the eligible supplies expenses is needed.	Y/N	Y/N
Receipts to support the home accessibility credit attached? Must be 65 years or older OR disabled.	Y/N	Y/N
Summarized receipts to support the multi-generational renovation credit attached?	Y/N	Y/N
Receipts to a qualified Canadian journalism organization attached?	Y/N	Y/N
Volunteer firefighter tax credit?	Y/N	Y/N
Donation slips attached (must have the charitable donation number on it)?	Y/N	Y/N
Political donation slips attached?	Y/N	Y/N
Listing of moving expenses paid in the year attached?	Y/N	Y/N
Are you eligible for the "First Time Home Buyers Amount"?	Y/N	Y/N
Details of interest paid to earn investment income attached?	Y/N	Y/N
Details of accounting or legal fees paid attached?	Y/N	Y/N
Details for other deductions or credits attached?	Y/N	Y/N

15. Medical	Taxpayer	Spouse
Medical receipts (includes dental, eyecare, prescriptions) attached? It would be helpful for your medical provider to give you a printout for your 2022 medical expenses.	Y/N	Y/N
Mileage for travel for medical purposes not provided in your area? If yes, we will need a log detailing the dates, purpose of the trip and the km travelled	Y/N	Y/N
Medical insurance premiums (Alberta Blue Cross, Manulife etc.)?	Y/N	Y/N
Recoveries or reimbursements from insurance for any receipts provided?	Y/N	Y/N

****We request the receipts to be sorted by individual, then by provider, then by date.****

Additional notes for accountant: