

# STERLING STANFORD

CHARTERED PROFESSIONAL ACCOUNTANTS

## PERSONAL INCOME TAX RETURN ORGANIZER

NAME \_\_\_\_\_

SPOUSE NAME \_\_\_\_\_

EMAIL \_\_\_\_\_

EMAIL \_\_\_\_\_

PHONE \_\_\_\_\_

PHONE \_\_\_\_\_

SIN \_\_\_\_\_

SIN \_\_\_\_\_

BIRTH DATE (YYYY/MM/DD) \_\_\_\_\_

BIRTH DATE (YYYY/MM/DD) \_\_\_\_\_

☐ SAME AS LAST YEAR

MAILING ADDRESS \_\_\_\_\_

CITY/PROVINCE \_\_\_\_\_ POSTAL CODE \_\_\_\_\_

PROVINCE OF RESIDENCE AT DECEMBER 31, IF NOT BC \_\_\_\_\_

MARITAL STATUS  
(ON DEC 31)

☐ MARRIED

☐ SINGLE

☐ SEPARATED

☐ COMMON LAW

☐ WIDOWED

☐ DIVORCED

IF MARITAL STATUS CHANGED THIS YEAR, ON WHAT DATE? \_\_\_\_\_

DEPENDANT NAME

BIRTH DATE (YYYY/MM/DD)

SIN

NET INCOME

DEPENDANT NAME	BIRTH DATE (YYYY/MM/DD)	SIN	NET INCOME
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

1. DO YOU, OR A DEPENDANT, QUALIFY FOR THE DISABILITY TAX CREDIT OR HAVE A PHYSICAL OR MENTAL IMPAIRMENT?

☐ YES ☐ NO

☐ YES ☐ NO

2. THE QUESTIONS BELOW MUST BE ANSWERED BEFORE YOUR RETURN CAN BE FILED:

a) ARE YOU A CANADIAN CITIZEN?

☐ YES ☐ NO

☐ YES ☐ NO

b) DO YOU AGREE TO PROVIDE YOUR INFORMATION TO ELECTIONS CANADA FOR THE NATIONAL REGISTER OF ELECTORS?

☐ YES ☐ NO

☐ YES ☐ NO

c) DO YOU AUTHORIZE CRA TO SHARE YOUR CONTACT INFORMATION WITH BC TRANSPLANT TO BE CONTACTED ABOUT ORGAN AND TISSUE DONATION?

☐ YES ☐ NO

☐ YES ☐ NO

d) DID YOU HOLD FOREIGN ASSETS WITH A COST IN EXCESS OF \$100,000, AT ANY TIME IN THE YEAR? IF YES, PROVIDE DETAILS.

☐ YES ☐ NO

☐ YES ☐ NO

3. DID YOU OPEN AN FHSA IN 2024?

☐ YES ☐ NO

☐ YES ☐ NO

4. DID YOU SELL (OR CHANGE USE) OF A HOUSING UNIT IN THE YEAR?

☐ YES ☐ NO

☐ YES ☐ NO

WAS IT EVER YOUR PRINCIPAL RESIDENCE?

☐ YES ☐ NO

☐ YES ☐ NO

DATE PURCHASED \_\_\_\_\_ DATE SOLD \_\_\_\_\_ SALE PROCEEDS \_\_\_\_\_

5. DID YOU PAY RENT IN THE YEAR TO AN UNRELATED LANDLORD?

IF YES: LANDLORD'S NAME \_\_\_\_\_ RENT PAID \_\_\_\_\_

ADDRESS RENTED \_\_\_\_\_ NO. OF MONTHS \_\_\_\_\_

## PERSONAL INCOME TAX RETURN CHECKLIST

### INCOME

- ☐ T4 - EMPLOYMENT INCOME/TIPS
- ☐ T4A - PENSION; ANNUITY; OTHER INCOME
- ☐ T4A(OAS) - OLD AGE SECURITY INCOME
- ☐ T4A(P) - CPP BENEFITS
- ☐ T4E - E.I. AND OTHER BENEFITS
- ☐ T4RIF - PROCEEDS FROM RRIF
- ☐ T4RSP - PROCEEDS FROM RRSP
- ☐ T5 - BANK INTEREST; TAXABLE DIVIDENDS
- ☐ T3 - STATEMENT OF TRUST INCOME
- ☐ T5007 - WCB BENEFIT/SOCIAL ASSISTANCE
- ☐ T5013 - PARTNERSHIP INCOME
- ☐ FOREIGN PENSION INCOME
- ☐ SPOUSAL SUPPORT RECEIVED
- ☐ RENTAL PROPERTY INCOME AND EXPENSES
- ☐ SELF-EMPLOYMENT INCOME AND EXPENSES
- ☐ CAPITAL GAIN AND LOSS REPORTS
- ☐ TIPS, GRATUITIES \$ \_\_\_\_\_

### OTHER INFORMATION

- ☐ NOTICE OF ASSESSMENT FROM LAST YEAR
- ☐ NOTICES OF REASSESSMENT (IF ANY)
- ☐ TAX INSTALMENT PAYMENT RECEIPTS
- ☐ DETAILS OF FOREIGN PROPERTY HOLDINGS
- ☐ SALE DOCUMENTS FOR PROPERTY SOLD

### DEDUCTIONS AND CREDITS

- ☐ RRSP/FHSA CONTRIBUTION RECEIPTS
- ☐ MEDICAL RECEIPTS
- ☐ NURSING HOME/ATTENDANT CARE
- ☐ PRIVATE HEALTH INSURANCE PREMIUMS
- ☐ CHARITABLE/POLITICAL DONATIONS
- ☐ UNION OR PROFESSIONAL DUES
- ☐ MOVING EXPENSE RECEIPTS
- ☐ T2202A - STUDENT TUITION RECEIPTS
- ☐ INTEREST ON STUDENT LOANS
- ☐ CHILD CARE RECEIPTS
- ☐ INTEREST ON INVESTMENT LOANS
- ☐ SPOUSAL SUPPORT PAID
- ☐ INVESTMENT MANAGEMENT FEES
- ☐ HOME BUYERS PLAN REPAYMENT
- ☐ LIFE LONG LEARNING PLAN REPAYMENT
- ☐ FIRST TIME HOME BUYERS - PURCHASE DETAILS
- ☐ EMPLOYMENT EXPENSES  
(T2200, MILEAGE LOG, HOME OFFICE)
- ☐ VOLUNTEER FIREFIGHTER  
(OR SEARCH AND RESCUE)
- ☐ HOME ACCESSIBILITY / BC RENOVATION TAX CREDIT
- ☐ SCHOOL SUPPLIES TAX CREDIT  
(FOR TEACHERS)
- ☐ TRADESPERSON TOOLS
- ☐ APPRENTICE LEVEL COMPLETED
- ☐ MULTIGENERATIONAL RENOVATION
- ☐ DIGITAL NEWS SUBSCRIPTION \$ \_\_\_\_\_  
PAID TO \_\_\_\_\_