

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

TAXPAYER

SPOUSE

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 2025?

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 INCOME \$ _____

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 _____

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