

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 |
|----------------|-------------------------|-------|------------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

| | TAXPAYER | SPOUSE |
|---|--|--|
| 1. DO YOU, OR A DEPENDANT, QUALIFY FOR THE DISABILITY TAX CREDIT OR HAVE A PHYSICAL OR MENTAL IMPAIRMENT? | <input type="checkbox"/> YES <input type="checkbox"/> NO | <input type="checkbox"/> YES <input type="checkbox"/> NO |
| 2. THE QUESTIONS BELOW MUST BE ANSWERED BEFORE YOUR RETURN CAN BE FILED: | | |
| a) ARE YOU A CANADIAN CITIZEN? | <input type="checkbox"/> YES <input type="checkbox"/> NO | <input type="checkbox"/> YES <input type="checkbox"/> NO |
| b) DO YOU AGREE TO PROVIDE YOUR INFORMATION TO ELECTIONS CANADA FOR THE NATIONAL REGISTER OF ELECTORS? | <input type="checkbox"/> YES <input type="checkbox"/> NO | <input type="checkbox"/> YES <input type="checkbox"/> NO |
| c) DO YOU AUTHORIZE CRA TO SHARE YOUR CONTACT INFORMATION WITH BC TRANSPLANT TO BE CONTACTED ABOUT ORGAN AND TISSUE DONATION? | <input type="checkbox"/> YES <input type="checkbox"/> NO | <input type="checkbox"/> YES <input type="checkbox"/> 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. | <input type="checkbox"/> YES <input type="checkbox"/> NO | <input type="checkbox"/> YES <input type="checkbox"/> NO |
| 3. DID YOU OPEN AN FHSA IN 2024? | <input type="checkbox"/> YES <input type="checkbox"/> NO | <input type="checkbox"/> YES <input type="checkbox"/> NO |
| 4. DID YOU SELL (OR CHANGE USE) OF A HOUSING UNIT IN THE YEAR? | <input type="checkbox"/> YES <input type="checkbox"/> NO | <input type="checkbox"/> YES <input type="checkbox"/> NO |
| WAS IT EVER YOUR PRINCIPAL RESIDENCE? | <input type="checkbox"/> YES <input type="checkbox"/> NO | <input type="checkbox"/> YES <input type="checkbox"/> 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 _____