



## TAX ORGANIZER: BRINGING KEY RECORDS TO YOUR TAX ACCOUNTANT

Following is a list of items to consider when gathering information to bring to your local tax accountant. While not all things apply to all people, the list can serve as a reminder to help you get organized.

### GENERAL ITEMS

- Prior year notice of assessment
- If you are a new client include your copy of last year's return filed.
- Other year re-assessments (if any) Note changes to personal status, such as marriage, separation, births, new address, telephone number, disabilities, deaths, etc.
- Details of personal changes during the year – marital status, birth, adoption, separation, address, phone, email...
- T4 (employment); T4A (commissions and self-employed); T4E (employment insurance)
- T4OAS (old age security)
- T4A(P) Canada Pension Plan Benefits
- \$US or German Pension Income
- T4APension Income
- T4 RIF
- T4RSP (retirement savings plan income)
- T5 (investment income); T3 (income from trusts)
- Interest income from mortgages or loans held by self
- T5007 (workers' compensation/social assistance payments)
- T5013 (partnership income)
- Documents re: purchase and sale of investments/real estate (including shares donated to charity; T664 capital gains election; T2017 Details of Reserves )
- Other income (RESP, death benefits, foreign income, tips)
- RRSP contribution slips
- RRSP Homebuyer and education withdrawal information
- Did you receive the Universal Child Care Benefit? Details
- Receipts for children's participation in fitness activities
- Receipts for public transit passes
- Medical, dental, nursing home, private medical insurance receipts
- Charitable donations
- Tuition fees/education amount, T2202A slips
- Interest paid on student loan(s)
- Professional dues/union dues
- Details of foreign property holdings (if any)
- Carrying charges/loan interest/spousal loan (must be for income producing purposes.)
- Safety deposit box fees
- Professional consultants' or brokerage fees for investments
- Spousal support income/payments
- Separation agreement (copy of the separation agreement)
- Dependent information (e.g., children, elderly parent, new spouse, etc.)

- T2201 Disability tax credit claim form completed by doctor, first year or renewal – for self or dependent
- Child care expense information
- Property taxes/rent paid and to whom
- Moving expenses re: new job
- Allowable Business Investment Loss details
- Political contribution receipts
- Tax instalments paid in the year (receipts required)
- Legal fees for employment disputes, tax objections, or appeals
- Employment expenses (and Form T2200 from employer)

### BUSINESS INCOME/SELF-EMPLOYED

#### INCOME/COMMISSION EXPENSES

- Revenue and expenses for the year
- Asset additions/ dispositions
- Business use of home details
- Business use of auto
- Total kilometers driven/ mileage log
- Form T2200 from employer (declaration of conditions of employment)
- Details of apprentice vehicle mechanic tool costs in year
- Auto operating costs
- Advertising and promotion
- Tax instalments paid to CRA for the year
- Truckers (TL2)/ meals and lodging

#### RENTAL PROPERTY

- Address and number of units
- Additions to Asset
- Sale of Rental Property details
- UCC of property as of January 1, current tax year
- Rent per unit
- Mortgage interest
- Property taxes paid
- Utilities
- Repairs and maintenance
- Renovation costs
- Other rental expenses
- Insurance