



# EVERYTHING FINANCIAL GROUP

Results Driven by Guidance, Performance and Strategy

## Personal Tax Organizer 2024

Name: \_\_\_\_\_

Name: \_\_\_\_\_

SIN: \_\_\_\_\_ DOB: \_\_\_\_\_

SIN: \_\_\_\_\_ DOB: \_\_\_\_\_

Marital Status: \_\_\_\_\_

Marital Status: \_\_\_\_\_

Email: \_\_\_\_\_

Email: \_\_\_\_\_

Address: \_\_\_\_\_ Phone: \_\_\_\_\_

Dependant Name	Relationship	DOB	Disability (DTC)	Net Income
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Personal Information	Yes	No	If yes, send us:
Did your marital status change during the year?			Date of Change (MM/DD)
Did your mailing address change during the year?			

Elections Canada	Yes	No	
Do you authorize CRA to provide your name, address and DOB to Elections Canada?			

Foreign Reporting	Yes	No	
Did you own foreign property with a total cost of more than \$100,000 at any time during the year?			
Did you own an interest in a foreign affiliate at any time during the year?			

Other Information:	Yes	No	
If this is your first filing with EFG?			please provide your previous tax year's T1 General.
Did you immigrate/emigrate from Canada during the year?			If yes, provide date:
Did the taxpayer become deceased during the year?			If yes, provide date:
Does the taxpayer or dependent qualify for the DTC (Disability Tax Credit)?			Is this a first year DTC Claim?
Did you make a Home Buyers Plan (HBP) withdrawal or are you repaying a HBP withdrawal?			Provide year of withdrawal, amount that has to be repaid annually, and how much has been repaid to end of 2023
Did you open an FHSA (First Home Savings Account)?			If yes, provide contribution slips (if applicable)



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Other Information (Cont'd):	Yes	No	
Did you make a Life Long Learning Plan (LLP) withdrawal or are you repaying a LLP withdrawal?			Provide year of withdrawal, amount that has to be repaid annually, and how much has been repaid to end of 2023
Did you rent your home from a third party?			If yes, provide landlord's name, months rented, and total rent paid for the year
Did you reside on Nisga'a Lands?			If yes, confirm if you are a member of the Nisga'a nation
Did you sell a property (or properties) in 2023 for which you are claiming a principal residence exemption?			If yes, provide address, year of purchase, how much the property was purchased for and how much it was sold for
Did you sell of a property (including a rental property), or rights to purchase a property in 2023?			If yes, provide address, year of purchase, how much the property was purchased for and how much it was sold for

Employment Income:	Yes	No	
Employment income			T4
Employee Profit Sharing Plan			T4PS
Do you have any taxable benefits not shown on slips (eg. Tips)			
EI (Employment Insurance) income			T4E
Workers' Compensation Benefits			T5007
Social Assistance Payments			T5007
Foreign Pension Income			
Did you have property rental income			<b>Complete a Statement of Rental Income</b> form for each property

Pension/Retirement Income:	Yes	No	
Pension, Annuity and other income			T4A
OAS (Old Age Security)			T4A(OAS)
CPP (Canada Pension Plan)			T4A(P)
RIF (Retirement Income Fund)			T4RIF
RRSP (Retirement Savings Plan)			T4RSP



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Investment Income:	Yes	No	
Trust Income (Interest/Dividends)			T3
Interest/Dividends			T5
Securities Transactions			T5008
Partnership Income			T5013

Employment Deductions:	Yes	No	
Are you paying Union/professional dues?			provide annual summary from union
Did you buy any Trade or Apprenticeship tools?			provide receipts & T2200
As an employee of a transport business, do you have meals and lodging expenses?			provide employer signed T2200 and TL2
As an eligible Educator, did you purchase eligible school supplies?			provide receipts
Are you claiming deductible employment expenses?			provide employer signed T2200 and <b>complete form T777</b>
Were you self-employed or paid by commission?			<b>Complete form T2125</b>
Do you need us to file your GST Return?			provide access code:
Do you make any GST installments during the year?			

Other Deductions:			
Did you make RRSP contributions?			provide ALL official slips
Do you have Investment Management Fees?			provide annual report
Do you have an Investment loan or LOC?			provide your Dec 31st statement showing interest payments made for the year
Charitable Donations			provide ALL receipts
Medical Expenses			provide all totals for each person (health and dental)
Did you pay for an individual health plan?			provide the annual total of premiums
Political Donations			provide slips
Child care Expenses			provide official receipts
Child Support/Spousal Support			provide details



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Other Deductions Cont'd:			
Tuition Slip(s)			T2202
Are you transferring tuition fees from child?			
Interest on Student Loan			provide receipt
Moving Expenses			<b><i>complete form T1M</i></b>