2023 PERSONAL TAX ORGANIZER

**Tax documents must be received by Portal upload or email by Friday, March 15, 2024, to be completed by Wednesday, May 1, 2024.**

If you have any questions, please contact reception @ 204-779-4674 or [reception@platinumbusiness.ca](mailto:reception@platinumbusiness.ca)

# Personal Information

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| *To complete this form digitally, you will only be able to type in the grey areas. Use Tab key or mouse to move to the next field* | | | | | | | |
| Your Full Name | |  | | | | | |
| Name of Spouse/Partner/Dependents | |  | | | | | |
|  | | | | | | | |
|  | | | | | | | |
| Did any of the following life events occur in 2023? If so, please indicate the date. | | | | | | | YYYY MM DD |
| Move to new address: | | | | | | |  |
| Did you own foreign property with a total cost of more than CDN$100,000 at any time during the year? Yes  No | | | | | | |  |
| Change of Marriage Status (Provide details): | | | | | | |  |
| Loss of Life | | | | | | |  |
| Change in Disability status (Provide details): | | | | | | |  |
| New Dependent:  Full Name | Relationship | Date of Birth  YYYY MM DD | SIN | In school? | Required to file a return? | Disability credit? | Dependent Expenses |
|  |  |  |  |  |  |  |  |

# Tax Slips, Receipts and Other Documents

Please indicate which information slips are applicable to your situation:

| **Yes** |  |
| --- | --- |
|  | T3 – Statement of Trust income |
|  | T4 – Employment income, tips |
|  | T4A – Self-employed commissions, pension, annuity, |
|  | T4A(OAS) – Old age security income |
|  | T4A(P) – CPP benefits |
|  | T4E – Employment Insurance and other benefits |
|  | T4PS – Statement of Employee Profit-Sharing Plan |
|  | T4RIF – Proceeds from RRIF |
|  | T4RSP – Proceeds from RRSP |
|  | T5 – Statement of Investment income (e.g. bank interest, dividends) |
|  | T5007 – Statement of Benefits (e.g. WCB benefit or social assistance payments) |
|  | T5008 – Income from securities transactions |
|  | T5013 – Statement of Partnership Income |
|  | Other employment income or taxable benefits not shown on T4 slips, such as tips |
|  | T2200 – Declaration of conditions of employment |
|  | T2202A – Student tuition receipts for you / spouse |
|  | RRSP contribution receipts |
|  | Medical receipts, for you and your dependents |
|  | Complete Statement Business Activities, Motor Vehicle Expenses, Home Office Expenses OR provide data from accounting software |
|  | Charitable and political donation receipts |
|  | Professional dues receipts |
|  | Property tax bill OR rent receipts |
|  | Foreign pension amount |
|  | Taxable spousal support received or paid |
|  | Real Estate Rentals Worksheet |
|  | Childcare receipts (including overnight camp) |
|  | Fitness tax credit receipts (16 and under) |
|  | Children’s arts tax credit receipts (under 16) |

# Capital Property Transactions

Complete the following if you acquired or disposed of property during the tax year, from which you earned income. If necessary, we may contact you to request additional information.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Description and/or Address of Property | Date Acquired | Cost | Date Disposed | Sales Proceeds | Expenses of disposition |
| YYYY MM DD | YYYY MM DD |
|  |  | $ |  | $ | $ |
|  |  | $ |  | $ | $ |
|  |  | $ |  | $ | $ |

|  |  |  |  |
| --- | --- | --- | --- |
| Interest paid to earn investment income | $ | Rental fee on safety deposit box | $ |
| Accounting/legal fees | $ | | |