

DISCLAIMER

This personal tax organizer is intended for Canadian resident taxpayers only. The purpose of this personal tax organizer is to assist you in gathering the information and supporting documents we need to complete your personal income tax return. Please complete the following sections to the best of your knowledge, and if you have any questions, please contact Numbers Plus Professional Corporation at 289-290-3322 or admin@numbersplus.ca.

Name:	_____	Spouse/Common-law partner:	_____
SIN:	_____	SIN:	_____
Date of birth:	_____	Date of birth:	_____
Email address:	_____	Email address:	_____
Phone number:	_____	Phone number:	_____
Marital status:	_____		
Address:	_____		

Dependant's Name	Relationship	Date of Birth	SIN	Net Income	Prepare Return? Click for Yes

General Information (Click for Yes otherwise leave blank)	Self	Spouse
Are you a Canadian citizen?		
As a Canadian citizen, do you authorize the CRA to give your name, address, date of birth and citizenship to elections Canada to update the National Register of Electors?		
Are you a U.S. citizen or green card holder?		
Do you believe you have income that may be exempt under the <i>Indian Act</i> ?		
Did you pay tax installments to the CRA?		
Was there a change in your marital status? If so, please provide date of change and a separation/divorce agreement if applicable.		
Have you made RRSP withdrawals under the Home Buyer's Plan or Lifelong Learning Plan?		
Do you have a First Home Savings Account (FHSA)?		
Did you or your spouse purchase a principal residence during the year?		
If so, were you first-time home buyers (i.e., you or your spouse have not owned a home in the last five years)?		
If you are you a GST/HST registrant do you need us to file GST/HST returns for you?		

For the following sections of this checklist, please ensure you send us any and all of the applicable information requested in the relevant documents/slips column.

General Information	Relevant Documents / Slips
Employment, retirement, commission, scholarship, and other incomes	T4 / T4PS / T4A / T4A(OAS) / T4A(P) / T4 RSP / T4RIF / T4A-RCA / T4E / T5007 // T4FHSA RC62 and details of other benefits or employment income not on T4 slip
Investment income and trust (e.g., dividends, interest)	T3 / T5 / T5013 / T5008 / T101 slips and any year-end tax reporting packages and summaries. Please include Gain/loss summary reporting dates of sales and purchases, proceeds and cost. Include Investment counsel fees/carrying charges/interest paid.
Foreign income	Foreign pension statements , US Forms SSA-1042, SSA-1099, 1099 / NR4 and year-end summaries, including any foreign tax paid
Foreign income verification report (T1135)	Provide details of foreign property with a total aggregate cost in excess of CAD \$100,000 or summary from financial advisor
Rental property	Please complete our schedule "Real Estate Rentals 776" for each rental property
Disposition of principal residence	Details including date of sale and purchase, proceeds received and cost
Disposition of any sales of significant assets not disclosed elsewhere. (Real estate, privately held shares, ...)	Details including date of sale and purchase, proceeds received and cost. If the sale of private company shares, indicate if the company was a Qualified Small Business Corporation. Please reach out if you are unsure.
Change in use (full or partial) in real estate properties (investment or personal)	Summary of cost and fair value of the property at the time of the change in use
Alimony or separation payments received	Amount and separation agreement to support
Self-employed/sole proprietor business activities	Please complete our schedule "Statement of Business Activities 2125" for each Self-employed business.
Prior year GST rebate	Prior year Notice of Assessment
Deductions / Credits	Relevant Documents / Slips
RRSP and FHSA contributions	RRSP slips (include Dec 31 statements and contributions for the first 60 days of 2026) plus T4FHSA, details of contributions made after first qualifying withdrawal
Union or professional dues	T4 or Payment information (receipts)
Child care expenses	Receipts, annual statements, T4 to child care provider, eligible summer camp receipts
Moving expenses (for a new job or to study full time)	Summary of expenses/receipts. Include details of any reimbursements.
Alimony or separation allowance	Amount and separation agreement support
Employment expenses, including GST/HST portion (e.g., car, home office)	Please complete our schedule "Employment Expenses 777", signed T2200 from employer
Eligible educator school supplies	Summary of expenses/receipts, signed letter from employer
Home accessibility expenses	Summary of expenses/receipts
Adoption expenses	Summary of expenses/receipts
Tuition fees (self, spouse, dependants)	T2202 slips (signed back page by dependant if tuition transferred)
Student loan interest	Statement of interest paid under an eligible government program
Medical expenses other than amounts reimbursed	Summary of expenses, including pharmacist or medical plan summary of amounts paid during the year, if available
Attendant care expenses	Annual statement / summary of eligible expenses from nursing or retirement home
Charitable and Political donations	Official donation receipts – include details in schedule provided
Digital news subscription	Official signed QCJO receipts
Ontario Trillium Benefit	Total of rent paid or Final Property Tax Statement for the year