

PERSONAL INCOME TAX ORGANIZER

Please use this sheet when collecting your slips for the **2021** taxation year

Name:	_____
Address:	_____

Phone:	_____
Email:	_____

Any new dependants during the year?	Yes _____	No _____
Has your address changed (note above)?	Yes _____	No _____
Has your marital status changed during the year?	Yes _____	No _____
Did you buy or sell your principal residence?	Yes _____	No _____
Did you buy or sell any other personal property?	Yes _____	No _____
Do you/your spouse or dependent qualify for the Disability Tax Credit?	Yes _____	No _____

	NAMES	SIN #	BIRTHDATES (YYYY-MM-DD)
Self	_____	_____	_____
Spouse	_____	_____	_____
Dependant 1	_____	_____	_____
Dependant 2	_____	_____	_____

INCOME TAX SLIPS AND RECEIPTS

_____ T4 Employment Income	_____ RRSP Contributions (including Jan - Feb 2022)
_____ T4A Pension & Other	_____ Union and Professional Dues
_____ T4E Employment Insurance	_____ Charitable Donations
_____ T5 Interest and Dividends	_____ Political Donations
_____ T4A RSP, RRIF	_____ Medical Expenses/Dental/Premiums
_____ T3 Investment, Gains, etc.	_____ Child Care
_____ 5007 Social Benefits	_____ Property Taxes/Rent
_____ 5008 Investment Gains & Losses	_____ Moving Expenses
_____ Investments bought and sold	_____ Tuition Receipts
_____ Foreign Pensions	_____ Home Buyers Plan
_____ Pension Income Splitting	_____ Attendant Care
_____ Alimony/Separation Payment	_____ Student Loan Interest
_____ Rental Income and Expenses	_____ Firefighter Credit (Fed and/or Provincial)
_____ Self Employed Business Income and Expenses	

NOTES OF ANYTHING NOT COVERED BY ABOVE