

PERSONAL INCOME TAX ORGANIZER

Please use this sheet when collecting your slips for the **2024** taxation year

Name:	_____
Address:	_____

Phone:	_____
Email:	_____

- | | | |
|--|------------|-----------|
| Any new dependents 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 and/or your spouse/dependent have a disability? | Yes | No |

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

INCOME TAX SLIPS AND RECEIPTS

_____ T4 Employment Income	_____ RRSPP Contributions (including Jan - Feb 2025)
_____ T4A Pension and 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	_____ Children's Activity Expenses
_____ 5008 Investment Gains & Losses	_____ Property Taxes/Rent
_____ Investments bought and sold	_____ Moving Expenses
_____ Foreign Income/Pensions	_____ Tuition Receipts
_____ Pension Income Splitting	_____ Home Buyers Plan
_____ Alimony/Separation Payment	_____ Attendant Care
_____ Rental Income and Expenses (AirBnB)	_____ Student Loan Interest
_____ Self Employed Business Income and Expenses	_____ Firefighter Credit (Fed and/or Provincial)

NOTES OF ANYTHING NOT COVERED BY ABOVE