2023 PERSONAL TAX ORGANIZER

Thank you for choosing Platinum Business Services Ltd. to prepare your personal income tax return(s) for 2023. Please complete this fillable checklist and submit along with your documents. **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

# Personal Information

|  |  |  |
| --- | --- | --- |
| *When completing this form digitally, you will only be able to type in the grey areas. Press the Tab key to move to the next field or use your mouse to select.*  | Social Insurance Number | Date of Birth |
| YYYY MM DD  |
| Your Full Name |       |                 |                  |
| Name of Spouse/Partner |       |                 |                  |
|  |
| Street Address |       | City |       |
| Province |       | Postal Code |       |
| Telephone (with area code) |       | Email address |       |
| Is your address new this year? | [ ]  Yes | [ ]  No |
| Marital status | [ ]  Single | [ ]  Common-law | [ ]  Married | [ ]  Separated | [ ]  Divorced | [ ]  Widowed |
| Split eligible pension income with spouse or common-law partner? | [ ]  Yes | [ ]  No |
|  |
| Did any of the following life events occur in 2023? If so, please indicate the date. | YYYY MM DD  |
|  Departure from or entry to Canada  |                  |
|  Marriage  |                  |
|  Separation or Divorce  |                  |
|  Loss of Life  |                  |

# Dependents

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  |  | Date of Birth | Social Insurance Number | In school? | Required to file a return? | Disability credit? | Dependent Expenses |
| Full Name | Relationship | YYYY MM DD  | Yes | Yes | Yes | Yes |
|       |  |                  |                 | [ ]  | [ ]  | [ ]  | [ ]  |
|       |  |                  |                 | [ ]  | [ ]  | [ ]  | [ ]  |
|       |  |                  |                 | [ ]  | [ ]  | [ ]  | [ ]  |
|       |  |                  |                 | [ ]  | [ ]  | [ ]  | [ ]  |

# Elections Canada

|  |  |  |
| --- | --- | --- |
| Are all individuals Canadian citizens? | [ ]  Yes | [ ]  No |
| If yes, the taxpayer(s) authorizes the CRA to provide his/her name, address and date of birth to Elections Canada to update his/her information on the National Register of Electors. | [ ]  Yes | [ ]  No |

|  |  |
| --- | --- |
| Foreign Reporting | Disability Tax Credit |
| Did you own or hold foreign property with a total cost of more than CDN$100,000 at any time during the year? If yes, please provide details. | [ ]  Yes[ ]  No | Are you or any of your dependents eligible to claim the disability amount? If yes, please provide a completed Disability Tax Credit Certificate. | [ ]  Yes[ ]  No |

# 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, and other income types |
| [ ]  | T4A(OAS) – Old age security income |
| [ ]  | T4A(P) – CPP benefits |
| [ ]  | T4E – Employment Insurance and other benefits |
| [ ]  | T4PS – Statement of Employee Profit-Sharing Plan Allocations and Payments |
| [ ]  | 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 |
| [ ]  | Self-Employed Income – must complete following worksheets: Business Activities, Motor Vehicle Expenses, Home Office Expenses OR provide data from accounting software |
| [ ]  | Charitable and political donation receipts, including gifting an item in kind |
| [ ]  | Professional dues receipts |
| [ ]  | Property tax bill OR rent receipts with landlord’s name |
| [ ]  | Foreign pension amount |
| [ ]  | Taxable spousal support received or paid |
| [ ]  | Rental properties – must complete Real Estate Rentals Worksheet |
| [ ]  | Childcare receipts (including private school attendance and 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 | $       |