Nash Giroux, LLP
Chartered Professional Accountants

Tax Organizer for the Year 2022

Name		**D.O.B.**	
S.I.N		**Mailing Address**	
Company			
Citizenship			

Status Single Married Common-law Widowed Divorced Separated

	Name	**S.I.N**	**D.O.B**	**Net Income**
Spouse				
Children				

	Home	**Work**	**Cell**	**Email**
Contact				

Consent Do you authorize the release of your name, address and date of birth to Elections Canada for enumeration purposes? Y N

Principal Residence Did you sell your principal residence? Report Address of the home sold (including postal code), Year Purchased and Sale Price. Y N

Documents Provided N.O.A. ☐ Installments ☐ T1013 ☐

Income

T4's	☐	T4A's	☐	T3's	☐	OAS	☐	T5007 ☐
T5's	☐	T4A(P)	☐	T4E's	☐	T4RRSP	☐	T5008 ☐

Capital Gains\Losses — Copies of brokerage statements, summaries, details of sales of real & personal property including rental properties. ☐

Rental Income — Details of rental income and expenses (i.e. Mortgage interest, utilities, property taxes, repair & maintenance, insurance) ☐

Self-Employment — Details of self-employment income and expenses (include where applicable: asset additions, loan and interest charges, home expenses including % of home used as an office, auto expenses, including total kilometers driven and business portion) Please provide your GST return if we are to prepare it. ☐

Other — Support payments ☐ Foreign Income ☐ Farming ☐

Deductions — Union\Professional ☐ Support ☐ RRSP ☐ Child Care ☐

Moving — Details of moving costs including transportation, temporary living costs, real estate commissions, legal fees, dates of move and total kilometers moved ☐

Carrying Charges — Interest expense on income producing assets, investment counsel fees, accounting and legal fees. ☐

Northern Residence — Street address or legal land description and whether claiming half or full. If you have box 32 or 33 in the footnote section of your T4, include dates of travel, who travelled, # of kilometers driven, lodging and any other travel type costs incurred. ☐

Employment Expenses — Form T2200 signed by your employer and details of eligible expenses ☐

Personal Credits

Medical	☐	Charity	☐	Tuition	☐	Student Loan int	☐
Caregiver	☐	Disability	☐	Public transit	☐		

Notes