

INCOME TAX ORGANIZER

Taxes at times are issues of stress. At Prudent we make it easy for you to submit your taxes error free and in time. As soon as you start receiving your slips, keep them in this organizer and half the work is already done. It is very important that you do not miss any slips to provide to us. Some slips such as your T3 & T5 may be issued late by some financial institutions, so be sure to have collected them all. We can only report what you have provided us.



PRUDENT

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YOUR PERSONAL INCOME TAX ORGANIZER 2018

Name: _____
Address: _____
Home Phone: _____ Cell Phone: _____
Email: _____

INCOME

Employment – T4 or T4A
Unemployment Insurance Benefits – T4E
Business, Professional, Partnership Income- (format download available on website)
Old Age Security – T4A (OAS)
Pension Income – T4 (P), T4A, T4RIF, T4RSP
Investment Income / Dividends – T5 or T3
Interest and other investment income – T3, T5 or T5800 (sale of stocks bonds etc.)
Limited Partnership – T5013, Worker’s Compensation – T5007
Rental Property or Basement Rent Income (format download available on website)
Capital Gains/Losses
Sale of any capital properties this year, such as Real Estate (rental or principal residence-your primary house), Stocks Bonds etc. (Attach copies of sales detail and original purchase)
Other income (e.g. stock options, alimony, pensions, annuities, research grants and bursaries, lump-sum pension receipts, RRSPs – attach T4RSP, Global income, Investment Income)
Universal Child Care Benefit - (RC62)
Foreign Asset over \$ 100,000 (T1135, download from site)

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DEDUCTIONS

Registered Retirement Savings Plan (attach receipts)
Annual union, professional or like dues (attach receipts)
Child Care expenses (attach receipts), Summer camps (please indicate number of weeks that were in-residence)
Alimony or Separation allowance paid (include the name and address of recipient and earliest date of separation), Legal fee paid to establish support payment
Moving expenses (attach receipts) and indicate distance moved for new employment (40km minimum)
Employment related expenses (details and form T2200 or T12 – form available to download)
Tools bought by tradesperson (attach receipts)/School supplies if you are a licensed teacher
Legal fee paid to recover the wages from employer
Interest on money borrowed to purchase an investment
Interest expenses and accounting fees paid for business
Rent/Property Taxes paid (attach receipts, format download available on website)
Statement of income tax installments paid to the date for current year
Custody agreement for a child (in case of separation and living with a child)
Charitable Donations (attach receipts)
Political Contribution (attach receipts)
Medical expenses (attach receipts), Payment to private health insurance plan.
Attendant care expenses (attach receipts)
Tuition Fees (attach T2202/T2202A paid by you or your dependent child), Student loan interest
Children's activities – Sports and Arts (attach receipts)
Transit passes (attach original passes or receipts)
Void cheque or Direct Deposit form for setting up a direct deposit option with CRA

DEPENDANT CHILDREN

Name of Child	Relationship	Birth date

ADDITIONAL PERSONAL EXEMPTIONS

If you are supporting your parents or other relatives who are living with you and are above the age of 65, please provide the following:

Name	Relationship	Birth date	Net Income

Disability Deduction (if first time, attach T2201 signed by physician)

P.S. We are always pleased to welcome referrals of new clients. Please let us know if you would like more copies of our Tax Organizer for a friend or colleague.