



2023 Canadian personal tax organizer

Personal tax simplified.

Name

First

Last

Contact information changed?

Yes No

If 'no' you can disregard the rest of this section

Address

Address Line 1

Address Line 2

City

State / Province / Region

Postal / Zip Code

Country

Phone

Email

Phone (Spouse)

Email (Spouse)

Spouse's income (if applicable)

If we do not prepare your spouse's return, please tell us their net income from Line 236 of their personal tax return.

Family members changed?

Yes No

If 'no' you can disregard the rest of this section

Family member changes

Were you the legal owner, jointly or otherwise, of a residential property in Canada as of December 31?

Yes No

Underused Housing Tax

Please contact success@achenhenderson.ca to discuss further.

[Details - Underused housing tax](#)

2. INCOME

Organize your information easier with our templates!

<https://www.achenhenderson.ca/corporate-tax-accountants/salaries-vs-dividends/>

Business

Send us your summary or try our templates using the link above!

[Required - Business income and expenses](#)

Rental

Send us your summary or try our templates using the link above!

[Required - Rental income and expenses](#)

Moved to another location or sold a home?

Send us your summary or try our templates using the link above!

[Required - Principal residence exemption](#)



Earn any other source of income?

i.e. Spousal support payments, Foreign income, cryptocurrencies, etc

Investments

Broker contact (Email or phone number)

Please send your "year-end tax package" or email your broker requesting this and authorization for ptax@achenhenderson.ca to contact them on your behalf.

If your investments are held outside of a brokerage, please contact us.

[Required - Investment income](#)

Anything else we should know?

3. DEDUCTIONS AND EXPENSES

Please provide a summary of your expenses. A detailed list can be found here:

[Detailed list of personal tax deductions and credits \(Canada Revenue Agency\)](#)

Medical

\$

[Requirements - Medical](#) or [disability](#)

Donations

\$

[Requirements - Donations](#)

Accounting fees

\$

[Requirements - Fees](#)

Investment fees

\$

[Requirements - Fees](#)

Professional dues

\$

[Requirements - Professional dues](#)

Moving Expenses

\$

[Requirements - Moving expenses](#)



Tuition

\$

[Requirements - Tuition](#)**Spousal support payments**

\$

[Requirements - Support payments paid](#)**Multigenerational home renovation**

\$

[Requirements - Multigenerational home renovation](#)**Child care**

\$

[Requirements - Child care](#)**Student Loan Interest**

\$

[Requirements - Student loan interest](#)**Digital news subscription**

\$

[Requirements - Digital news subscription](#)**Exploration and development expenses**

\$

[Requirements - Exploration and development](#)**Business investment loss**

\$

[Requirements - Business investment loss](#)**Employment expenses (T777 from your employer is required)**

Send us your summary or try our templates using the link above!

[Required - Other employment expenses](#)**RRSP Contribution (Slips)**

i.e. I have 3 slips, totalling \$____, which are attached.

4. PERSONALIZED LIST OF SLIPS

Need a reminder of your slips from last year?

E-mail info@achenhenderson.ca for a personalized list. We're happy to help!**5. FINAL STEPS****Please note: Paper documents dropped off at our office are subject to a flat rate scanning charge of \$150.****[CLICK HERE TO UPLOAD YOUR DOCUMENTS](#)**

There are SO many ways that you can scan documents to us!

- [iPhone & iPad](#)
- [Android phone & tablet](#)
- Alternatively, your [nearest Staples location](#) offers scanning services

Once your documents are scanned you can upload them to the link above.

List of outstanding documents

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If you are missing some information, just let us know what you are expecting here!

