

**PERSONAL TAX ORGANIZER
2023 TAXATION YEAR**

Thank you for choosing RSP LLP to be your trusted tax return preparer.

Please take a few minutes to fill out the Personal Tax Organizer. This document will help us to prepare your tax returns in a timely and efficient manner, and identify tax-saving opportunities for you and your family. Unless indicated otherwise, all questions below refer to the 2023 year.

Note: There are currently no tax filing extensions announced for the 2023 personal tax returns.

Your name: _____

Email address: _____

Preferred way of contact (phone, email): _____

FOR NEW CLIENTS ONLY:

If you are a new client of RSP, please provide (in the lines below) the *name, address, social insurance number, date of birth, and marital status* for each family member for whom a tax return is to be done.

Please also provide a copy of the prior year tax return and notice of assessment for each family member.

PART I: PERSONAL INFORMATION

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|--|----------|----------|
| 1. Has your basic information (e.g. name, address) changed in 2023?
If yes, provide details of new name, address, and other relevant information. | Y | N |
| 2. Did you become married, or enter into a common-law relationship, in 2023?
If yes,
a. Provide date of marriage.
b. Provide name, SIN and date of birth of spouse or common-law partner.
c. Are we preparing a 2023 tax return for your spouse or common-law partner?
<i>If no, indicate SIN, date of birth and net income (Line 23600) of spouse or common-law partner.</i> | Y | N |
| 3. Did you separate, or become divorced, in 2023?
If yes,
a. Provide date of separation or divorce.
b. Did you transfer any property to your spouse?
<i>If yes, describe any transfers made to spouse or separation.</i>
c. Did you pay spousal or child support payments?
<i>If yes, provide details and copy of relevant agreements and amendments.</i>
d. Did you receive spousal or child support payments?
<i>If yes, provide details and copy of relevant agreement and amendments.</i> | Y | N |
| 4. Do you have any children born in 2023?
If yes, provide name, social insurance number, and date of birth of each new child. | Y | N |
| 5. Are there persons dependent upon you because of their age or disability?
If yes, provide name, address, social insurance number, date of birth, disability certificate, detail of infirmities, and income information for each dependent. | Y | N |
| 6. Are you a Canadian citizen?
If yes, do you authorize the CRA to provide information to Elections Canada? | Y | N |

PART II: INCOME AND GAINS

7. Did you receive EI benefits? If yes, provide T4E slips.	Y	N
8. Did you earn employment income? If yes, provide T4 slips.	Y	N
9. Did you earn self-employed income? If yes, provide income and expenses, including any gross income generated from internet webpages and websites (IWW) of the business.	Y	N
10. Did you receive interest, dividends or royalties? If yes, provide T5 and T3 slips.	Y	N
11. Did you own any partnership interests? If yes, provide T5013 slips, and details of original investment, income allocation, contributions and distributions.	Y	N
12. Did you own any rental properties? If yes, provide the following for each property: address, original cost, and details of rental income and expenses.	Y	N
13. Did you sell or transfer shares, bonds, real estate or other properties? If yes, a. Provide details of original cost, selling price, and cost of disposition. b. Was it made to a related individual or corporation? <i>If yes, provide identity of the related individual or corporation.</i>	Y	N
14. Did you sell your principal residence? If yes, a. Provide sale proceeds, cost of property, and disposition costs. b. Do you wish to claim the principal residence exemption? c. Was there a change of use of your principal residence to income producing property? d. Was there a change of use from an income producing property to a principal residence? e. Were there moving expenses related to employment relocation?	Y Y Y Y	N N N N
15. Did you receive pension income, or withdraw from RRSP, RRIF or RDSP? If yes, provide T4A(OAS), T4A(P), T4A, T4RRSP, T4RRIF slips. Does the taxpayer elect to split eligible pension income with spouse or common law partner?	Y Y	N N
16. Did you receive workers' compensation or social assistance? If yes, provide T5007 slips.	Y	N

17. Did you receive any other income? Y N
If yes, provide details of income received.

PART III: DEDUCTIONS AND CREDITS

18. Did you incur work-space-in-home expenses? Y N
(See note below)

If yes, indicate which method you would like to use:

- You will be required to use the detailed method (must provide work space details and signed Form T2200). The temporary flat rate method does not apply to the 2023 tax year.

Note for Question 18:

Employees can use the **detailed method** to claim actual expenses paid for the period that they worked from home. Under this method, employees must:

- Calculate the size of the work space,
- Keep supporting documents, and
- Obtain Form T2200 (or T2200S) from the employer.

Employees can **NO** longer use a **simplified method** (or the “**temporary flat rate method**”) in 2023 tax year.

19. Did you incur any other employment expenses? Y N
If yes, provide details of automobile, travel, parking, meals, etc., and signed Form T2200.

20. Did you contribute to an RRSP/PRPP? Y N
If yes, provide RRSP/PRPP receipts.

21. Did you incur childcare expenses? Y N
If yes, provide receipts, and details of daycare, camp, nanny costs (including name, SIN and other details of service provider).

22. Did you repay under the Home Buyers Plan or Lifelong Learning Plan? Y N
If yes, provide details of repayment, and a copy of plan.

23. Did you pay professional, union or similar dues? Y N
If yes, provide professional due receipts.

24. Did you pay examination fees to obtain a recognized professional status or tradesperson license? Y N
If yes, provide examination fee receipts.

25. Did you incur any debts for investment or business purposes? Y N
If yes, provide purpose of the loan and the interest paid.

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| 26. Did you incur accounting, investment counsel or management fees?
If yes, provide amounts paid. (<i>Note: Do not include fees paid for registered accounts RRSP, RESP, TFS, RRIF</i>) | Y | N |
| 27. Did you (or a dependent) study at a university or college?
If yes, provide T2202 slips or form TL11A (for foreign universities). | Y | N |
| 28. Did you (or a dependent) pay student loan interest?
If yes, provide details and amount of interest paid. | Y | N |
| 29. Did you make charitable donations or political contributions?
If yes, provide official donation and contribution receipts. | Y | N |
| 30. Did you (or a dependant) incur medical or attendant care expenses?
If yes, provide medical slips and receipts (annual summary from pharmacist preferred). | Y | N |
| 31. Did you pay for a digital news subscription in 2023 as you may be entitled to a tax credit?
If yes, provide a receipt. | Y | N |
| 32. Did you spend on home accessibility or renovations for an individual who is either eligible for the disability tax credit or 65 years of age or older at the end of 2023?
If yes, provide a receipt. | Y | N |

PART IV: FOREIGN REPORTING

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| 33. Did you earn foreign employment income?
If yes, provide details of foreign employment income earned and foreign taxes paid. | Y | N |
| 34. Did you earn income from foreign investments?
If yes, provide details of foreign investment income earned and foreign taxes paid. | Y | N |
| 35. Did you receive foreign pension income?
If yes, provide gross amount of foreign pension income received. | Y | N |
| 36. Did you own “specified foreign property” (SFP) at any time in 2023?
(<i>See note below</i>)
If yes, was the total cost of all SFP more than CAD\$100,000? | Y | N |

If no, sign and date **Appendix A** on the following page.

APPENDIX A
REPRESENTATION RE: FOREIGN PROPERTY

I, _____, confirm that at all times during the 2023 year, I did not own specified foreign property with a total cost of more than CAD\$100,000.

Signature

Date