

WISE & COMPANY

2023 TAX ORGANIZER

Taxpayer #1

Taxpayer #2

Name:		
Marital Status:		
SIN:		
Birthdate:		
Citizenship:		
Phone:		
Email:		
Address:		

Dependent Information:

Name	Birthdate	SIN	Income	Citizenship

Income:

Employment [T4, T4A, T4PS]	Commission Income and Expenses
Tips, Gratuities [not included on T4]	Business Income and Expenses
Pension [T4A, T4AP, T4OAS]	Professional Income and Expenses
Retirement [T4RSP, T4RIF, T4RCA]	Farming Income and Expenses
EI Benefits [T4E]	Rental Income and Expenses
Investments [T3, T5, T5008]	Capital Gains/Losses [proceeds, cost, sale date,...]
Partnership [T5013]	Sale of Principal Residence [proceeds, cost, sale date,...]
Other Benefits [T4A, T5007]	Foreign Income
Taxable Benefits from Corporations [auto, loans, etc.]	Sale of Foreign Real Property [proceeds, cost, sale date,...]
First Time Home Buyers [purchase docs req'd]	Other Income [details required]

Deductions:

Tax Credits:

RRSP Contribution Receipts	Dependent / Care Giver Tax Credit
Union / Professional Dues	Medical Receipts
Child Care Expenses	Interest Paid on Student Loans
Business Investment Losses	Tuition Receipts [T2202, TL11A]
Moving Expenses	Disability Tax Credit [T2201]
Support Payments [alimony only]	Charitable Donation Receipts
Interest on Investment Loans	Political Donation Receipts
Investment Counseling Fees	Home Accessibility Tax Credit [receipts required]
Flow Thru Shares [T101, T5013]	First-Time Homebuyers Purchase Agreement
Employment Expenses [T2200 and amount details]	Volunteer Firefighter's and Search & Rescue Amounts
Trades / Mechanics Tools Expenses [T2200 and \$]	Digital News Subscription Expenses
Northern Residents Deduction	Eligible Educator School Supply [receipts required]

Other Information:

Engagement Letter	Consent Form	[one form per taxpayer]
Direct Deposit for Individuals [one form per taxpayer]	T183 EFile Authorization Form	[one form per taxpayer]
Direct Deposit for Business	Foreign Asset Reporting Waiver	[cost > \$100K]