

WISE & COMPANY

2025 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] |