

# 2022 PERSONAL INCOME TAX ORGANIZER

## Personal Information

Taxpayer	Spouse or Common-Law Spouse
Name:	Name:
Telephone Number:	
Home: Office:	
Email Address:	

S.I.N.	S.I.N.
Date of Birth:	Date of Birth:
Address:	
Marital Status at Dec. 31, 2022	If marital status changed in year, date of change:

### Information re dependent children who do not need to file tax returns:

Name:	Name:	Name:
Date of Birth:	Date of Birth:	Date of Birth:
Income for 2022:	Income for 2022:	Income for 2022:

## Information Slips

	Taxpayer	Spouse	Joint		Taxpayer	Spouse	Joint
	<b># of Slips</b>				<b>\$ Amount or # of Slips</b>		
Employment Income (T4)				Property Taxes/Rent			
Old Age Security (T4AOAS)				Social Assistance Received			
Canada/Quebec Pension Plan (T4AP)				RRSP Contributions			
Other Pension Income (T4A)				Union or Professional Dues			
Profit Sharing Plan (T4PS)				Home Expenses Due to Covid-19			
EI Benefits (T4E)				Investment Counsel Fees			
Investment Income (T5)				Tuition Fees (T2202A/TL11)			
T-Bill Income (T-BD1)				Tuition Fees of Dependents T2202A			
Canada Savings Bond (T600)				Medical Expenses			
Mutual Fund or Trust Income (T3)				Attendant/Child Care Expenses			
Realized Capital Gain/Loss (T5008)				Charitable Donations			
Income from Limited Partnerships (T5013)				Political Contributions			
RRSP Income (T4RSP)				Tax paid by installments			
RRIF Income (T4RIF)				Foreign Income e.g. UK Pension			
Universal Child Care Benefit (RC62)				2021 Notice of Assessment (copy)			
WCB Payments Received (T5007)							

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# Questionnaire

Yes No

Did you dispose of any stocks, bonds, T-bills, mutual funds, real estate, or other property in 2022?  
If yes, include T5008 or list the sale proceeds, date of sale, cost of acquiring the property, the V-day value of the property if owned on December 31, 1971 and costs incurred in selling the property.

**Did you own any savings bonds or other investments on which interest was compounding at December 31, 2022 for which you have not received a T5 for 2022?**

Did you have any investment loans outstanding during 2022?  
If yes, indicate lender, interest paid, principal outstanding, and investment purpose of loan.

**Did you earn rental income in 2022?**

**If yes, list gross rental income and all expenses. If you bought or sold a rental property in 2022 include statement of adjustments and copy of latest property tax assessment.**

Did you incur child care expenses in 2022?  
If yes, list amounts paid and name, address and S.I.N. of person paid.

**Did you move to start a new job or business in 2022, and if so, is your new residence at least 40 kilometers closer to your new work location? If yes, list all receipts and details of moving expenses.**

Were you self-employed in 2022?

If yes, provide a list of revenue and expenses, and GST charged and paid.

**Did you incur employment expenses for which you were not reimbursed by your employer?**

**If yes, provide a list of all expenses and obtain a certified Form T2200 from your employer.**

If you were self-employed or have Form T2200 did you incur automobile expenses?

If yes, provide details of the expenses and total and business kilometers driven in the year.

**Are you 65 years of age and paid for eligible transit service? If yes, please provide amounts paid.**

Did you, or a dependent, have a severe mental or physical impairment in 2022, and did the impairment markedly restrict day to day activities?

If yes, you should enclose Form T2201, Disability Tax Credit certificate signed by your doctor (if you have not submitted the form in the past)

**Did you receive /pay alimony or spousal support in 2022?**

**If this is first year of doing so, provide copy of divorce or separation agreement.**

**If you were the "payer", provide name, S.I.N. and address of recipient.**

Did you purchase a new home in 2022 and are eligible for first-time home buyers credit. If yes, provide details of home purchase and owners.

**Will you be claiming a credit for the education and tuition fees of a dependent, if available?**

**If yes, obtain a signature of dependent on back of Form T2202A "Tuition and Education credit Certificate" and provide details of dependent's income.**

Did you hold or own foreign property at any time in 2022 with a total cost of more than \$100,000 Canadian? If yes, enclose Foreign Securities Report or details of foreign property.

**Did you sell your principal residence in 2022? If yes, provide dates of acquisition, proceeds of disposition and description of property.**

Were you required to work from home 50% of the time for a period of at least four consecutive weeks in 2022 due to Covid 19? If Yes, indicate if you are claiming the home office expenses under the detailed method or the flat method. If detailed method submit completed and signed Form T2200S and expenses.

**Disclaimer:** This document is intended as a resource tool to assist you in organizing your financial matters. It does not intend to replace professional tax or financial advice. Every effort has been made to compile this material from reliable sources however it is subject to change without notice and no warranty can be made as to its accuracy or completeness. Before acting on any of this information, please consult your Assante advisor for individual financial advice based on your personal circumstances. Assante Capital Management Ltd. is a member of the Canadian Investor Protection Fund and the Investment Industry Regulatory Organization of Canada.