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**2023 Personal Income Tax Organizer**

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To help us better serve you and to ensure you fully benefit from the deductions to which you are entitled, please take a few minutes to complete this questionnaire to the best of your ability. Return the completed questionnaire to us electronically through your [Client Portal](#) or physically with the rest of your tax information. All taxpayers for which WMKL will be completing 2023 Income Tax and Benefit Returns for should complete this form.

**Personal Information** (returning clients only need to complete if there are changes from 2022)

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First Name	_____	Spouse's first name	_____
Last Name	_____	Last Name	_____
Email	_____	Email	_____
SIN	_____	SIN	_____
Date of birth (mm-dd-yyyy)	_____	Date of birth (mm-dd-yyyy)	_____
Marital Status	_____	Net Income	_____
Date of change of marital status (mm-dd)	_____	(If T1 not to be prepared by WMKL)	

**Address** (returning clients only need to complete if there are changes from 2022)

Number	_____	Street	_____	Apt	_____
City	_____	PO Box	_____	RR	_____
Province	_____	Postal Code	_____		

**Contact Information**

Home \_\_\_\_\_ Cellular \_\_\_\_\_ Work \_\_\_\_\_ Ext. \_\_\_\_\_

**Principal Residence**

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If you sold your principal residence during 2023, provide copies of all documents concerning the sale. In addition, please summarize the following:

Year Purchased \_\_\_\_\_  
Proceeds on Sale \_\_\_\_\_  
Did you own an additional residence/cottage other than your principal residence? \_\_\_\_\_

**Prior Year Tax Return Information** (new clients only)

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Please provide last year's tax return and associated notice of assessment. If possible, please send us the last two year's tax returns and associated notices of assessment.

**Dependents' Information** (Returning clients complete for changes. Please attach separate page if required.)

Name	Relationship	Date of Birth (mm-dd-yyyy)	SIN	Net Income	Disability?	Post-Secondary?	Child Care Expense?
					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**General Information**

Please read carefully. This section is to gather information required to file your income tax return. Mark the columns with a check if any of the following applies:

	Taxpayer	Spouse
Are you a US citizen or green card holder?	<input type="checkbox"/>	<input type="checkbox"/>
Elections Canada: Are you a Canadian citizen?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, do you authorize the Canada Revenue Agency to give your name, address, date of birth, and citizenship to Elections Canada to update the National Register of Electors?	<input type="checkbox"/>	<input type="checkbox"/>
You own or held foreign property at any time in 2023 with a total cost of more than \$100,000 Canadian (excluding personal use property)	<input type="checkbox"/>	<input type="checkbox"/>
You spent a significant amount of time outside of Canada in 2023. If yes, please indicate number of days _____ (if multiple trips, please provide a list with arrival and departure dates)	<input type="checkbox"/>	<input type="checkbox"/>
If applicable and beneficial, you will elect to split pension income.	<input type="checkbox"/>	<input type="checkbox"/>
You paid instalments for the 2023 taxation year. If yes, indicate the amounts paid. Federal _____ Quebec _____ Alberta _____	<input type="checkbox"/>	<input type="checkbox"/>
You want to start direct deposit or change account information If yes, send us a void cheque, or sign up online through <a href="#">CRA My Account</a> or call 1-800-959-8281	<input type="checkbox"/>	<input type="checkbox"/>

**Income Information**

Please submit all tax slips received for the 2023 taxation year, including any T3's, T4's, T4A's, T4RIF's, T5's, etc.

Do you have any additional income amounts that are not reported on tax slips? Please indicate which of the following may apply.

	Check (v)		Check (v)
Interest or other investment income	<input type="checkbox"/>	Personal property sales	<input type="checkbox"/>
Taxable benefits not on the T4 slip	<input type="checkbox"/>	Real estate sales or purchases	<input type="checkbox"/>
Foreign income/taxes	<input type="checkbox"/>	Tax shelter sales or purchases	<input type="checkbox"/>
Stocks/bonds/mutual fund sales	<input type="checkbox"/>	Other (specify) _____	<input type="checkbox"/>

### Applicable Deductions/Tax Credits

Please indicate which of the following deductions or credits that you may be eligible for and provide appropriate receipts.

	Taxpayer	Spouse		Taxpayer	Spouse
RRSP Contribution	<input type="checkbox"/>	<input type="checkbox"/>	RPP Contributions	<input type="checkbox"/>	<input type="checkbox"/>
Home Buyers' Plan withdrawal	<input type="checkbox"/>	<input type="checkbox"/>	Home Buyers' Plan reimbursement	<input type="checkbox"/>	<input type="checkbox"/>
Lifelong Learning Plan withdrawal	<input type="checkbox"/>	<input type="checkbox"/>	Lifelong Learning Plan reimbursement	<input type="checkbox"/>	<input type="checkbox"/>
Tuition fees	<input type="checkbox"/>	<input type="checkbox"/>	Tuition transfer (T2202 from children)	<input type="checkbox"/>	<input type="checkbox"/>
Interest paid on student loans	<input type="checkbox"/>	<input type="checkbox"/>	Union/professional or like dues	<input type="checkbox"/>	<input type="checkbox"/>
Medical expenses	<input type="checkbox"/>	<input type="checkbox"/>	Charitable donations	<input type="checkbox"/>	<input type="checkbox"/>
Support payments made	<input type="checkbox"/>	<input type="checkbox"/>	Political contributions	<input type="checkbox"/>	<input type="checkbox"/>
Childcare costs	<input type="checkbox"/>	<input type="checkbox"/>	Employee HST/GST rebate	<input type="checkbox"/>	<input type="checkbox"/>
Carrying charges (investments interest/fees)	<input type="checkbox"/>	<input type="checkbox"/>	Home Accessibility receipts (senior/disabled)	<input type="checkbox"/>	<input type="checkbox"/>
Employment expenses (send T2200)	<input type="checkbox"/>	<input type="checkbox"/>	Moving Expenses	<input type="checkbox"/>	<input type="checkbox"/>
Northern Residents Deduction	<input type="checkbox"/>	<input type="checkbox"/>	Ontario Staycation Tax Credit	<input type="checkbox"/>	<input type="checkbox"/>
Digital News Subscription	<input type="checkbox"/>	<input type="checkbox"/>	First Home Savings Account Contributions	<input type="checkbox"/>	<input type="checkbox"/>

### Additional Potential Benefits

Please indicate which of the following you have paid and provide details or receipts as they may represent additional tax benefits.

	Check (v)		Check (v)
Claim for meals and lodging expenses (TL2)	<input type="checkbox"/>	First time disability credit (provide T2201)	<input type="checkbox"/>
Accountant/legal fees	<input type="checkbox"/>	First-time home buyer	<input type="checkbox"/>
Property taxes or rent paid	<input type="checkbox"/>	Tax shelter purchases	<input type="checkbox"/>
Teacher and ECE Supplies	<input type="checkbox"/>	Other (specify) _____	<input type="checkbox"/>

### Home Office Expenses (if T2200/T2200S received, also complete if you run a business from your home)

Square footage of home office	_____	Square footage of home	_____
Heat	_____	Rent	_____
Electricity	_____	Home Internet	_____
Water	_____	Insurance *	_____
Maintenance	_____	Property Taxes *	_____

\* Only employees who earn commissions are eligible to deduct insurance and property taxes as home office expenses.

**T2125 – Statement of Business or Professional Activities (if applicable, or provide a separate schedule)**

Business Name \_\_\_\_\_  
Nature of Business \_\_\_\_\_  
HST Registered? (Yes/No) \_\_\_\_\_  
If yes, provide HST # \_\_\_\_\_

**Income 2023**

Sales and commissions \_\_\_\_\_

**Expenses**

Advertising \_\_\_\_\_  
Insurance \_\_\_\_\_  
Interest and bank charges \_\_\_\_\_  
Office expenses \_\_\_\_\_  
Professional fees \_\_\_\_\_  
Rent \_\_\_\_\_  
Salaries \_\_\_\_\_  
Traveling expenses \_\_\_\_\_  
Meals and entertainment \_\_\_\_\_  
Dues, licenses \_\_\_\_\_

**Expenses (cont'd)**

Supplies \_\_\_\_\_  
Management fees \_\_\_\_\_  
Maintenance and repairs \_\_\_\_\_  
Property taxes \_\_\_\_\_  
Telephone and utilities \_\_\_\_\_  
Other (specify) \_\_\_\_\_  
Other (specify) \_\_\_\_\_  
Other (specify) \_\_\_\_\_  
Other (specify) \_\_\_\_\_  
Other (specify) \_\_\_\_\_

**Motor Vehicle Expenses (this section only applicable if T2200/T2200S received, or if you run a business from your home)**

Did you purchase a new vehicle during the year? Yes/No \_\_\_\_\_ Did you lease it? Yes/No \_\_\_\_\_  
If so, please send a copy of the purchase/lease agreement.

Make \_\_\_\_\_ Date of Acquisition \_\_\_\_\_  
Model \_\_\_\_\_ Business Kilometers \_\_\_\_\_  
Year \_\_\_\_\_ Total Kilometers \_\_\_\_\_

Fuel \_\_\_\_\_ Maintenance and repairs \_\_\_\_\_  
Insurance \_\_\_\_\_ Other (specify) \_\_\_\_\_  
Licence and Registration \_\_\_\_\_ Other (specify) \_\_\_\_\_

Did you sell an existing vehicle that you previously used in a business? Yes/No \_\_\_\_\_  
If so, please send a copy of the sale documents.

**T776 – Statement of Real Estate Rentals (if applicable, or provide a separate schedule)**

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Address of Property \_\_\_\_\_  
Co Owners Name(s) \_\_\_\_\_  
Percentage of Ownership \_\_\_\_\_  
Personal use Percentage \_\_\_\_\_

**Income** **2023**

Gross Rents \_\_\_\_\_

**Expenses**

Advertising \_\_\_\_\_  
Interest \_\_\_\_\_  
Professional fees \_\_\_\_\_  
Maintenance and repairs \_\_\_\_\_  
Property taxes \_\_\_\_\_  
Utilities \_\_\_\_\_  
Insurance \_\_\_\_\_

**Expenses (cont'd)**

Office expenses \_\_\_\_\_  
Management fees \_\_\_\_\_  
Salaries \_\_\_\_\_  
Traveling expenses \_\_\_\_\_  
Other (specify) \_\_\_\_\_  
Other (specify) \_\_\_\_\_  
Other (specify) \_\_\_\_\_

**Additional Notes (please indicate any additional vital information pertaining to your tax situation)**

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