

Personal Tax Organizer

个人税资料整理表

A fillable checklist to help organize common Canadian personal tax documents. NiuTax focuses on corporate tax and cloud bookkeeping; this template is provided as a free resource.

用于整理加拿大个人报税常见资料的可填写模板。NiuTax 主要服务公司税与云端记账，本文件作为免费资源提供。

Important / 重要提示

- Do not send completed forms containing SIN or full bank information by regular email unless specifically instructed.
- 请勿通过普通邮件发送含 SIN 或完整银行账户信息的表格，除非已确认安全提交方式。
- This organizer is for information collection only and does not create an engagement.
- 本模板仅用于资料整理，不代表已建立服务委托关系。

Tax year 税务年度

Prepared for 填写人

1. Personal Information / 个人信息

Legal first name 名

Legal last name 姓

SIN 社会保险号码

Date of birth 出生日期

Mailing address 通讯地址

City 城市

Province 省份

Postal code 邮编

Phone 电话

Email 邮箱

Single 单身

Married 已婚

Common-law 同居伴侣

Separated / Divorced 分居/离婚

Canadian citizen 加拿大公民

Address changed this year 地址变更

2. Spouse and Dependants / 配偶及受抚养人

Spouse name 配偶姓名

Spouse SIN 配偶 SIN

Spouse DOB 配偶出生日期

Spouse net income 配偶净收入

Dependant #1: name, DOB, relationship, net income / 受抚养人 #1: 姓名、生日、关系、净收入

Dependant #2: name, DOB, relationship, net income / 受抚养人 #2: 姓名、生日、关系、净收入

Dependant #3: name, DOB, relationship, net income / 受抚养人 #3: 姓名、生日、关系、净收入

3. Income Documents / 收入资料

- | | |
|---|--|
| <input type="checkbox"/> T4 employment income 雇佣收入 | <input type="checkbox"/> T4A / T4A(P) / T4A(OAS) |
| <input type="checkbox"/> T5 investment income 投资收入 | <input type="checkbox"/> T3 trust income 信托收入 |
| <input type="checkbox"/> T5008 securities 证券交易 | <input type="checkbox"/> RRSP / pension slips |
| <input type="checkbox"/> Employment insurance / benefits
Other income notes / 其他收入说明 | <input type="checkbox"/> Other income documents 其他收入 |

4. Self-Employment / 自雇或生意收入

Business name 生意名称

Business type 业务类型

Gross income 总收入

GST/HST number 税号

Major expenses: advertising, vehicle, meals, supplies, phone, home office, etc. / 主要支出

5. Rental Property / 租金收入

Property address 物业地址

Gross rental income 租金总收入

Ownership % 持有比例

Rental expenses: property tax, insurance, mortgage interest, repairs, utilities, condo fees, etc. / 租赁支出

6. Deductions and Credits / 抵扣与税务抵免

- | | |
|---|---|
| <input type="checkbox"/> RRSP contributions RRSP 供款 | <input type="checkbox"/> Childcare expenses 托儿费 |
| <input type="checkbox"/> Medical expenses 医疗费用 | <input type="checkbox"/> Donations 捐款 |
| <input type="checkbox"/> Tuition / T2202 学费 | <input type="checkbox"/> Union / professional dues 会费 |
| <input type="checkbox"/> Moving expenses 搬家费用 | <input type="checkbox"/> Home office / T2200 居家办公 |

Other deductions or credits / 其他抵扣或抵免

7. Foreign Assets and Other Notes / 海外资产及其他事项

- Foreign assets over CAD \$100,000 海外资产超过 CAD \$100,000
- Sold principal residence 出售自住房
- Crypto activity 加密货币交易
- CRA letters received 收到 CRA 信件

Notes / 备注

8. Confirmation / 确认

- I confirm the information is complete to the best of my knowledge. 本人确认资料尽可能完整准确。
- I understand this organizer is not tax advice. 本人了解此表不构成税务建议。

Signature 签名

Date 日期