

Personal Tax Organizer - 2026

For your 2026 T1 return (filed in spring 2027)

HJ Wu & Company Inc. (CPA)

Vancouver, BC

Fill this in on your computer or print it. Skip anything that does not apply. Rough numbers are fine, we will tidy them up with your slips and receipts. Save the file and send it back to us along with your documents.

ABOUT YOU

Full legal name

Phone

Email

Date of birth

Mailing address

City / Postal code

Marital status on December 31, 2026:

☐ Single ☐ Married ☐ Common-law ☐ Separated ☐ Divorced ☐ Widowed

Spouse / partner name

Spouse net income (if known)

☐ I moved during 2026 ☐ I changed my name ☐ Spouse / partner is also a client

CHILDREN AND OTHER DEPENDANTS

Name

Date of birth

Relationship

Child care paid (\$)

Name

Date of birth

Relationship

Child care paid (\$)

Name

Date of birth

Relationship

Child care paid (\$)

INCOME SLIPS AND PAPERS I HAVE (TICK ALL THAT APPLY)

- | | | |
|--|---|---|
| ☐ T4 (employment) | ☐ T4A (pension, other) | ☐ T5 (interest, dividends) |
| ☐ T3 (trust income) | ☐ T5008 (securities) | ☐ T4E (EI benefits) |
| ☐ T4A(OAS) / T4A(P) | ☐ RRSP / RRIF slips | ☐ Self-employment income |
| ☐ Rental income | ☐ Sold investments | ☐ Sold a property |
| ☐ Foreign income | ☐ Cryptocurrency | ☐ Gig work (Uber, etc.) |

DEDUCTIONS AND CREDITS (AMOUNTS FOR 2026)

RRSP contributions	<input type="text"/>	FHSA contributions	<input type="text"/>
Union or professional dues	<input type="text"/>	Child care expenses	<input type="text"/>
Medical expenses (total)	<input type="text"/>	Charitable donations	<input type="text"/>
Tuition (T2202)	<input type="text"/>	Student loan interest	<input type="text"/>
Moving expenses	<input type="text"/>	Home office (work from home)	<input type="text"/>
Tools / supplies (employee)	<input type="text"/>	Support payments made	<input type="text"/>
Political contributions	<input type="text"/>	Other deduction	<input type="text"/>

BC AND VANCOUVER ITEMS

Rent paid in BC in 2026 (\$)	Landlord name
<input type="text"/>	<input type="text"/>

- | | |
|--|--|
| ☐ I own a home in Vancouver | ☐ I own other BC property |
| ☐ I filed the Empty Homes Tax | ☐ I filed the Speculation and Vacancy Tax |
| ☐ I have the Disability Tax Credit approved | |

ANYTHING NEW OR DIFFERENT THIS YEAR? (TICK ALL THAT APPLY)

- | | |
|--|---|
| ☐ Started a business | ☐ Closed a business |
| ☐ Got married or separated | ☐ Had a baby or adopted |
| ☐ Bought a home | ☐ Sold a home |
| ☐ Changed jobs | ☐ Retired |
| ☐ Owned foreign property over \$100,000 CAD | ☐ Got a CRA letter or notice |
| ☐ Received an inheritance | ☐ Lived or worked outside Canada |

Anything else we should know? Questions for us?