

PERSONAL TAX ORGANIZER

For the year _____

Please complete this T1 Organizer before your appointment. Please attach all applicable slips, lists, and other supplemental information.

1. Personal Information

	Name	SIN	Date of Birth (dd/mm/yy)	Phone	
				Office	Ext
Taxpayer					
Spouse					
Address				Home	
				Mobile	
Email:					

Marital Status: Married Single Common-law Separated Divorced Widowed

If married or common-law, should your return be filed jointly with your spouse's return? Yes No

If marital status changed during the year, provide date of change (dd/mm/yy): _____

2. Residence

Province or territory of residence on December 31 _____

Did the taxpayer immigrate to Canada or emigrate from Canada during the year? Yes No

If yes, provide date of entry into Canada _____ or date of departure _____

3. Elections Canada

Is the taxpayer a Canadian citizen? Yes No

If yes, the taxpayer authorizes the CRA to provide his/her name, address and date of birth to Elections Canada to update his/her information on the National Register of Electors. Yes No

4. Foreign Reporting

Did the taxpayer own or hold foreign property with a total cost of more than CDN\$100,000 at any time during the year? Yes No

If yes, please provide list.

5. Change in Personal or Financial Situation During the Year

Date the taxpayer declared bankruptcy during the year _____

Date the taxpayer refinanced a business with new or revised debt _____

Date the taxpayer closed a bank account or investment account _____

6. Dependants

Name	Relationship	Date of Birth	SIN	Physically or Mentally Infirm?	Income	Child Care Expenses

Universal Child Care Benefits (UCCB) – Is RC62 slip attached? Yes No

If the taxpayer is a single parent, is the UCCB designated to a dependant? Yes No

7. General Income/Deductions

T4 – Employment income? Yes No

T4A – Commission and self-employment? Yes No

T4E – Employment insurance? Yes No

T5007 – Social assistance? Yes No

Employment income or taxable benefits not shown on the T4 slip? _____

Amount paid for union and professional dues and organization names? _____

List of child care expenses, with receipts, for each child? Yes No

List of moving expenses paid in the year? Yes No

List of support payments made or received? Yes No

List of deductible employment expenses? Yes No

Is a signed form T2200 attached? Yes No

8. Pension Income

T4A – Pension, retirement and annuity income? Yes No

T4A(P) – Canada pension plan benefits? Yes No

T4A(OAS) – Old age security pension slip/foreign pensions? Yes No

T4A-RCA – Retirement compensation arrangements? Yes No

T4RSP – Registered retirement savings plan income? Yes No

T4RIF – Registered Retirement income fund income? Yes No

Does the taxpayer elect to split eligible pension income with his/her spouse or common-law partner? Yes No

9. Investment Income/Deductions

- T3 – Income from trust allocations? Yes No
- T5 – Investment income? Yes No
- T4PS – Income from profit sharing plans? Yes No
- T5013 – Partnership income? Yes No
- T5008 – Income from securities transactions? Yes No

Did the taxpayer dispose of property during the year? If so, provide the following details in a separate list:

Description of Property	Date Acquired	Date Disposed of	Sales Proceeds	Cost	Expenses for Disposal

Interest paid to earn investment income _____ Rental fee on safety deposit box _____ Accounting/legal fees _____

10. Self-Employment/Business Income

- Financial statement(s)/schedule of revenue and expenses attached? Yes No
- Has the taxpayer registered to be eligible for Employment Insurance special benefits? Yes No
- If an owner/manager, did the taxpayer have a shareholder loan outstanding during the year? Yes No
- If yes, provide details of borrowings and repayments: _____
- If the taxpayer used a vehicle for business, are the vehicle expenses and both total and business mileage attached? Yes No
- If the taxpayer used a portion of his/her home for business, are the home expenses and both total and business square footage attached? Yes No
- Is a list of all new asset additions and deletions attached? Yes No

11. Rental Income

- If the taxpayer owned rental property, is a statement of rental income attached? Yes No

12. RRSP/pool registered pension plan (PRPP) Contributions

- T-slip for contributions made attached? Yes No
- Where any amounts repaid during the year to a home buyers plan or a lifelong learning plan? Yes No

13. Other Credits

- | | | |
|---|------------------------------|-----------------------------|
| T2202A – Tuition/education amount for taxpayer? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| T2202A – Tuition/education amount claimed on transfer from dependant? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Receipt or amount for taxpayer's student loan interest? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Receipts/listing of all medical expenses paid in the year for taxpayer, spouse, and dependants? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| First-time making charitable donations? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Receipts for charitable donations or donations made by way of gifting an item in kind? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Were any loans associated with the charitable donations? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Receipts for political contributions? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Public transit passes? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Receipts/listing for fitness and extracurricular activity amounts paid for each child? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Statement for new home to claim the home buyer's amount? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Amount of property taxes/rent paid in the year? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

14. Prior Year Tax Return Information/Correspondence

- | | | |
|---|------------------------------|-----------------------------|
| Is a copy of the Notice of Assessment for last year's tax return attached? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| If new to the firm, are tax returns (and corresponding Notices of Assessment) for the last three years attached? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| If taxpayer claimed a loss carryback in any of the preceding 3 years, are the Notices of Reassessment for those years attached? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Is a copy of any other correspondence from the Canada Revenue Agency attached? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| If you would like your tax refund deposited directly into your account, is a void cheque attached? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Is your statement of instalments paid for the year attached? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |