

# PERSONAL TAX ORGANIZER

## For the year 2017

Please complete this T1 Organizer before your appointment. Please attach all applicable slips, receipts, 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 – T1135

Did the taxpayer own or hold foreign property with a total cost between CANS\$100,000 and CAN\$250,000 at any time during the year?  Yes  No

Did the taxpayer own or hold foreign property with a total cost of more than CANS\$250,000 at any time during the year?  Yes  No

If yes, please provide us with a list and all relevant details.

### 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 slips – 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?

\_\_\_\_\_

Provide us with the amount paid for union and professional dues as well as the names of the organizations?

\_\_\_\_\_

List of child care expenses, with receipts, for each child?

Yes

No

List of moving expenses paid?

Yes

No

List of spousal 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 or investments (including a principal residence) during the year? If so, provide the following details in a separate list:

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

Interest paid to earn investment income \_\_\_\_\_ Management fees \_\_\_\_\_ 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, repayments, and year-end balance if owner/manager owes the company money:

\_\_\_\_\_

- 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 asset additions and disposals (including cars, equipment, etc.) attached?  Yes  No

**11. Rental Income**

- If the taxpayer owned rental property, is a statement of rental income attached?  Yes  No
- Does the taxpayer also live in the rental property (in which case no CCA should be claimed)?  Yes  No

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

- T-slip for contributions made attached?  Yes  No
- Were any amounts repaid during the year to a home buyers' plan or a lifelong learning plan?  Yes  No

### 13. Other Credits

- T2202 – Tuition/education amount for taxpayer?  Yes  No
- T2202 – Tuition/education amount claimed on transfer from dependant?  Yes  No
- Receipt or amount for taxpayer's student loan interest?  Yes  No
- Receipts/listing of all medical expenses paid in the year for taxpayer, spouse, and dependants?  Yes  No
- First-time making charitable donations?  Yes  No
- Receipts for charitable donations or donations made by way of gifting an item in kind?  Yes  No
- Were any loans associated with the charitable donations?  Yes  No
- Receipts for political contributions?  Yes  No
- List of eligible teaching supplies purchased (for teachers and early childhood educators only)?  Yes  No
- Public transit passes (receipts/details)?  Yes  No
- Receipts/listing for fitness and arts activity amounts paid for each child?  Yes  No
- Information pertaining to the purchase of a new home to claim the first-time home buyer's amount?  Yes  No
- Amount of property taxes/rent paid in the year and name of landlord/municipality?  Yes  No
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### 14. Prior Year Tax Return Information/Correspondence

- Is a copy of the Notice of Assessment for last year's tax return attached?  Yes  No
- If new to the firm, are tax returns (and corresponding Notices of Assessment) for the last three years attached?  Yes  No
- If taxpayer claimed a loss carryback in any of the preceding 3 years, are the Notices of Reassessment for those years attached?  Yes  No
- Is a copy of any other correspondence from the Canada Revenue Agency attached?  Yes  No
- If you would like your tax refund deposited directly into your account and if you have not already registered for direct deposit, is a void cheque attached?  Yes  No
- Is your statement of instalments paid for the year attached?  Yes  No