

# 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	
E-mail:					

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 your 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 the date of entry into Canada \_\_\_\_\_ or the 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? If yes, please provide a list.  Yes  No

## 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	Disability Amount	Income	Child Care Expenses

Universal Child Care Benefits (UCCB) – Is the 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? \_\_\_\_\_  
 Amount and organization of union/professional dues? \_\_\_\_\_  
 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  
 T4AP – 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/T5013(A) – 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	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 information 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 information attached?  Yes  No
- Is a list of all new asset additions attached?  Yes  No

## 11. Rental Income

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

## 12. RRSP Contributions

- T-slip for contributions made attached?  Yes  No

## 13. Other Credits

- T2202 – Tuition/education amount for the taxpayer?  Yes  No
- T2202 – Tuition/education amount claimed on transfer from the dependant?  Yes  No
- Receipt or amount for the taxpayer's student loan interest?  Yes  No
- Receipts/Listing of all medical expenses paid in the year for the taxpayer, spouse, and dependants?  Yes  No
- Receipts for donations?  Yes  No
- Receipts for charitable 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
- Tickets for public transit?  Yes  No
- Receipts/listing for fitness amount paid for each child?  Yes  No
- Receipts/listing for activities paid for each child?  Yes  No
- Statement for new home to claim the home buyer's amount?  Yes  No
- Amount of property taxes/rent paid in the year?  Yes  No

## 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 the taxpayer claimed a loss carryback in any of the preceding three 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, is a void cheque attached?  Yes  No
- Is your statement of instalments paid for the year attached?  Yes  No