

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

Have you change your address during the year? Yes No

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

Are you an American Citizen? 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 list. Yes No

Do you have any Foreign Affiliates? Yes No

5. Change in Personal or Financial Situation During the Year

Date the taxpayer declared bankruptcy during the year _____

Date the taxpayer refinance 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 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 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
 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 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/Foreign Income

Financial statement(s)/ schedule of revenue and expenses attached? Yes No
 Have you any foreign income? If Yes what Country _____ Yes No
 Are you a member of a Partnership? IF yes explain _____ 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 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 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, dependants? Yes No

Any Legal Expenses? Purpose? _____ 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

Northern Resident? Yes No

Receipts/listing for fitness and extracurricular activity amounts 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 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, is a void cheque attached? Yes No

Is your statement of instalments paid for the year attached? Yes No

15. Current Year Tax Return Information

Losses of other years? Yes No

Foreign Tax Credits? Yes No

For Vehicle Expenses:

a) Details of purchase or sale of automobiles used for business or commission purposes, Yes No

b) Details of lease payments, loans, interest on loans, insurance, repairs, fuel, registration, & parking, Yes No

c) Total kilometers driven during the year, and Total business kilometers driven during the year. Yes No

Interest on loans incurred for investment purposes, including interest paid in broker accounts Yes No

Safety Deposit Fees? Yes No

16. Other Items

- For self-employed persons or employees eligible to claim home office expenses:
- | | | |
|--|------------------------------|-----------------------------|
| a) Details of the portion of the home used for business purposes (square footage of the office compared to the total square footage of the home or the number of rooms in the home), | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| b) Rent, utilities, repairs and maintenance, | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| c) For commission sales: all of the above plus insurance and taxes, and | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| d) For self-employed persons: all of the above plus mortgage interest. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
- TL2 signed by employer of transport employee, details of hours per trip and number of trips, and related meals and lodging expenses?
- | | | |
|--|------------------------------|-----------------------------|
| | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
|--|------------------------------|-----------------------------|
- Business investment Losses?
- | | | |
|--|------------------------------|-----------------------------|
| | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
|--|------------------------------|-----------------------------|
- Attendant care expenses for a disabled dependent?
- | | | |
|--|------------------------------|-----------------------------|
| | <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 |
|--|------------------------------|-----------------------------|