

**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? If yes, please provide list.  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

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 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, spouse, and dependants?  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

Tickets for public transit?  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