

PERSONAL TAX ORGANIZER
For the year _____

Please complete this T1 Organizer before your appointment.

1. Personal Information

Name		SIN	Date of Birth	Office	Phone	Ext.
Taxpayer						
Spouse						
Address				Res.		
				Cellular		

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

2. Residence

The taxpayer was resident in a Canadian province or territory on December 31. Yes No

If yes, indicate province or territory of residence _____

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

The taxpayer is 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

5. Change in Personal or Financial Situation during the Year

Did the taxpayer's marital status change during the year? Yes No

Did the taxpayer die during the year? Yes No

Did the taxpayer declare bankruptcy during the year? Yes No

Did the taxpayer refinance a business with a new or revised debt? Yes No

Did the taxpayer close a bank account or investment account? Yes No

If yes, provide details _____

6. Dependants

Name	Relationship	Date of Birth	SIN	Disability Amount	Income	Child Care Expenses

Did the taxpayer receive/repay Universal Child Care Benefits? Yes No

If yes, is the RC62 slip attached? Yes No

7. Employment Income/Deductions

Did the taxpayer earn income from employment? Yes No

If yes, are T4 slips attached? Yes No

Did the taxpayer receive Employment Insurance? Yes No

If yes, is the T4E slip attached? Yes No

Did the taxpayer receive taxable benefits not shown on the T4 slip? Yes No

Did the taxpayer receive any employment income in the form of commission? Yes No

Did the taxpayer receive a GST rebate? Yes No

If yes, amount received: _____

Did the taxpayer pay union/professional dues? Yes No

If yes, provide details: _____

- Is the taxpayer claiming deductible employment expenses? Yes No
- If yes, is a signed Form T2200 attached? Yes No
- Does the taxpayer participate in a employee profit-sharing plan? Yes No
- If yes, is the T4PS slip attached? Yes No

8. Pension Income

- Did the taxpayer receive pension income? Yes No
- If yes, are the appropriate T-slips attached? Yes No
- If yes, please select all applicable boxes:
- Old Age Security T4A(OAS) CPP/QPP T4A(P) Pension T4A
- RRSP/RPP/RRIF T4RSP/T4RIF

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

9. Investment Income/Deductions

- Did the taxpayer earn investment income? Yes No
- If yes, are the appropriate T-slips attached? Yes No
- If yes, please select all applicable boxes:
- Interest (T5/T600) Dividends (T5) Estate/Trust (T3)
- Partnership/Tax Shelters ((T101/T5013)

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

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

Was the taxpayer self-employed during the year? Yes No

If yes, is (are) the appropriate self-employment statement(s) attached? 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: _____

11. Rental Income

Did the taxpayer have rental income? Yes No

If yes, is a statement of rental income attached? Yes No

12. RRSP Contributions

Did the taxpayer make an RRSP contribution during the year? Yes No

If yes, is the T-slip and other documentation attached? Yes No

Nature of RRSP contribution: Contribution to personal RRSP Contribution to spousal RRSP

13. Other Items

Tuition/Education amount for self? Yes No

If yes, is the appropriate T-slip attached? Yes No

Tuition/Education amount claimed on transfer from dependant? Yes No

If yes, is the appropriate T-slip attached? Yes No

Did the taxpayer pay interest on a student loan? Yes No

If yes, are the appropriate details disclosed in an attached schedule? Yes No

Are child-care expenses claimed? Yes No

If yes, is the appropriate documentation attached? Yes No

- Are medical expenses claimed? Yes No
- If yes, is the appropriate documentation attached? Yes No
- Are charitable donations claimed? Yes No
- Are donations slips attached? Yes No
- Were any charitable donations made by way of gifting an item in kind? Yes No
- Were any loans associated with the charitable donations? Yes No
- Are political contributions claimed? Yes No
- Are donation slips attached? Yes No
- Was tax paid by instalments? Yes No
- If yes, has the taxpayer provided information on the amount paid? Yes No
- Public transit amount claimed? Yes No
- If yes, amount claimed: _____
- Children's fitness amount claimed? Yes No
- If yes, amount claimed: _____
- Are home renovation expenses claimed? Yes No
- If yes, are receipts attached? Yes No
- Home buyers amount claimed? Yes No
- If yes, amount claimed: _____

14. Prior Year Tax Return Information/Correspondence

- Is a copy of last year's tax return attached? Yes No
- Is a copy of the Notice of Assessment for last year's tax return attached? Yes No
- Are you a new client of the firm? Yes No
- If yes, are tax returns for the last three years (and corresponding Notices of Assessment) attached? Yes No
- Other than the Notice of Assessment for your tax return, did you receive any other correspondence from the Canada Revenue Agency? Yes No
- Is a copy of this correspondence attached? Yes No