

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)	Office	Phone	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): _____

Was the taxpayer born in the U.S. or is he/she a U.S. citizen? Yes No

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 CAN\$100,000 and CAN\$250,000 at any time during the year? If yes, please provide the total foreign income and capital gains earned during the year. Yes No

Did the taxpayer own or hold foreign property with a total cost of more than CAN\$250,000 at any time during the year? If yes, please provide a detailed list of all income and capital gains earned during the year. 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	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 and for whom? 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 during the year (excluding any residences that were designated as a principal residence at any time in 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

Did the taxpayer dispose of any property or investments during the year that were designated as a principal residence at any time in 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			
Adjusted cost base at the time of disposition			
If owned prior to 1982, fair market value of property as at December 31, 1981			
If owned prior to 1982, adjusted cost base of property as at December 31, 1981			
Which years was this property designated as a principal residence?			

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

Where any amounts repaid during the year to a home buyers' plan or a lifelong learning plan? Yes No

13. Other Credits

- T2202A – Tuition amount for taxpayer? Yes No
- T2202A – Tuition 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 for travel prior to July 1, 2017, or for travel after June 30, 2017, for Ontario seniors (receipts/details)? Yes No
- Receipts/listing for fitness and arts activity amounts paid for each child (applicable for taxpayers living in British Columbia, Manitoba, Quebec, and Yukon)? 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 CRA 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