

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
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12. RRSP Contributions

T-slip for contributions made attached?	Yes	No
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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