

**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:

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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