

PERSONAL TAX RETURN ORGANIZER
For the year _____

Please complete this T1 Organizer before your appointment.

1. Personal Information

| Name | | SIN | Date of Birth | Phone (Bus.) |
|----------|--|-----|---------------|--------------|
| Taxpayer | | | | |
| Spouse | | | | |
| Address | | | | Phone (Res.) |

Marital Status: Married Single Common-law Separated Divorced Widowed

If married or common-law, should your tax return be filed jointly with your spouse's return? Yes No

2. Elections Canada

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

3. Foreign Reporting

Did the taxpayer own or hold foreign property with a total cost of more than \$100,000CAN at any time during the year? Yes No

4. Change in Personal or Financial Situation During the Year

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

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 _____

Did the taxpayer become deceased during the year? Yes No

If yes, provide:

 date of death _____

Did the taxpayer declare bankruptcy during the year? Yes No

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

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

If yes, provide details: _____

5. Dependants

| Name | Relationship | Date of Birth | SIN | Disability Amount | Income |
|------|--------------|---------------|-----|-------------------|--------|
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

6. 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 T2200 attached? | Yes | No |
| Does the taxpayer participate in an employee profit-sharing plan? | Yes | No |
| If yes, is the T4PS slip attached? | Yes | No |

7. Pension Income

| | | |
|---|----------------|------------------------------|
| Did the taxpayer receive pension income? | Yes | No |
| If yes, are the appropriate T slips attached? | Yes | No |
| Old Age Security T4(OAS) | CPP/QPP T4A(P) | Pension T4A |
| | | RRSP /RPP /RRIF T4RSP/T4RRIF |

8. Investment Income/Deductions

| | | |
|---|----------------|---------------------------------------|
| Did the taxpayer earn investment income? | Yes | No |
| If yes, are the appropriate T slips attached? | Yes | No |
| 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 | Sale Proceeds | Cost | Expenses for Disposal |
|-------------------------|---------------|---------------|---------------|------|-----------------------|
| | | | | | |
| | | | | | |
| | | | | | |

Interest paid to earn investment income _____

Rental fee on safety deposit box _____

Accounting/legal fees _____

9. 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: _____

10. Rental Income

Did the taxpayer have rental income? Yes No

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

11. 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

12. 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

Are 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 donation 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 donation? | 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 |

13. 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 |