

PERSONAL TAX ORGANIZER

For the year _____

Please complete this T1 Organizer . Attach all applicable slips, 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

Marital status changed during the year, Yes No
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 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 of more than CDN\$100,000 at any time during the year? Yes No

If yes, please provide a list and relevant details.

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	Physical or mental impairment?	Income	Child Care Expenses

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 paid for union and professional dues and organization names? _____
- 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 – Partnership income? Yes No
- T5008 – Income from securities transactions? Yes No

Did the taxpayer dispose of property or investments during the year? If so, provide the following details in a separate list:

Description and Quantity of Property	Date Acquired	Date Disposed of	Sales Proceeds	Cost	Expenses for Disposal

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:

- 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 and choose not to claim CCA? Yes No

12. RRSP/ PRPP Contributions

- T-slip for contributions made attached? Yes No
- Were any amounts repaid during the year to a home buyer's plan or a lifelong learning plan? Yes No

13. Other Credits

- | | | |
|---|------------------------------|-----------------------------|
| T2202 – Tuition/education amount for taxpayer? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| T2202 – Tuition/education amount claimed on transfer from dependant? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Receipt or amount for taxpayer's student loan interest? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Receipts/listing of all medical expenses paid in the year for taxpayer, spouse, and dependants? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| First-time making charitable donations? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Receipts for charitable donations or donations made by way of gifting an item in kind? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Were any loans associated with the charitable donations? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Receipts for political contributions? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| | <input type="checkbox"/> | <input type="checkbox"/> |
| Statement for new home to claim the home buyer's amount? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Amount of property taxes/rent paid in the year? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

14. Prior Year Tax Return Information/Correspondence

- | | | |
|---|------------------------------|-----------------------------|
| Is a copy of the Notice of Assessment for last year's tax return attached? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| | <input type="checkbox"/> | <input type="checkbox"/> |
| If taxpayer claimed a loss carryback in any of the preceding 3 years, are the Notices of Reassessment for those years attached? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Is a copy of any other correspondence from the Canada Revenue Agency attached? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| If you would like your tax refund deposited directly into your account, is a void cheque attached? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Is your statement of instalments paid for the year attached? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |