

**PERSONAL TAX ORGANIZER**  
**For the year \_\_\_\_\_**

Please complete this T1 Organizer before your appointment.

**1. Personal Information**

Name		SIN	Date of Birth	Phone	
				Office	Ext.
Taxpayer					
Spouse					
Address				Res.	
				Cellular	

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

**2. Residence**

The taxpayer was resident in a Canadian province or territory on December 31.      Yes      No

If yes, indicate province or territory of residence \_\_\_\_\_

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**

The taxpayer is 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?      Yes      No

## 5. Change in Personal or Financial Situation during the Year

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

Did the taxpayer die during the year? Yes No

Did the taxpayer declare bankruptcy during the year? Yes No

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

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

If yes, provide details \_\_\_\_\_

## 6. Dependants

Name	Relationship	Date of Birth	SIN	Disability Amount	Income	Child Care Expenses

Did the taxpayer receive/repay Universal Child Care Benefits? Yes No

If yes, is the RC62 slip attached? Yes No

## 7. 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 Form T2200 attached? Yes  No

Does the taxpayer participate in a employee profit-sharing plan? Yes  No

If yes, is the T4PS slip attached? Yes  No

## 8. Pension Income

Did the taxpayer receive pension income? Yes  No

If yes, are the appropriate T-slips attached? Yes  No

If yes, please select all applicable boxes:

Old Age Security T4A(OAS)                     
  CPP/QPP T4A(P)                     
  Pension T4A  
 RRSP/RPP/RRIF T4RSP/T4RIF

Does the taxpayer elect to split eligible pension income with his/her spouse or common-law partner? Yes  No

## 9. Investment Income/Deductions

Did the taxpayer earn investment income? Yes  No

If yes, are the appropriate T-slips attached? Yes  No

If yes, please select all applicable boxes:

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	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

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: \_\_\_\_\_

## 11. Rental Income

Did the taxpayer have rental income?	Yes	No
If yes, is a statement of rental income attached?	Yes	No

## 12. 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

## 13. 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
If yes, are the 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 donations 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 donations?	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
Public transit amount claimed?	Yes	No
If yes, amount claimed: _____		
Children's fitness amount claimed?	Yes	No
If yes, amount claimed: _____		
Are home renovation expenses claimed?	Yes	No
If yes, are receipts attached?	Yes	No
Home buyers amount claimed?	Yes	No
If yes, amount claimed: _____		

## 14. 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