

PERSONAL INCOME TAX ORGANIZER

Please complete this pdf fillable form before you send us your information. **We strongly recommend you please send all applicable slips, receipts, summaries, and other pertinent information via electronic means.** Sending us your information via electronic means is the most efficient and timely way to send us your tax information and for us when working on the file. Contact the person in charge of your file via email or phone to find out the options to send in your information.

1. Personal Information (if any changes)

Name		SIN	Date of Birth (dd/mm/yyyy)	Phone	
				Mobile or office	Ext
Taxpayer					
Spouse					
Address				Home	

Name of taxpayer, spouse and dependents	Email addresses

Marital Status: ☐ Married ☐ Single ☐ Common-law ☐ Separated ☐ Divorced ☐ Widowed

If marital status changed during the year, provide date of change (dd/mm/yyyy): _____

Was the taxpayer born in the US or is he/she a U.S. citizen? And same question applies to any dependents?

If yes, please discuss with the person in charge of your file as soon as possible. ☐ Yes ☐ No

If you are a new client to the firm, provide copies of the tax returns for the last 3 tax years ☐ Yes ☐ No

2. Dependents (if any changes - new additions during taxation year)

Name	Relation	Date of Birth (dd/mm/yyyy)	SIN	Disability (Y/N)?	T2201 Disability tax credit certificate (Y/N)?

3. Residence (if any changes)

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 _____

4. Elections Canada, Organ and tissue donor registry (if any changes)

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

Do you consent to providing you name and email address to Ontario Health (Trillium Gift of life) so they contact you to send information via email about organ and tissue donations. ☐ Yes ☐ No

5. 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 along with the top 3 foreign jurisdictions by cost. If your foreign investments are held through a financial institution, they can provide a foreign asset report.) ☐ 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 the total cost base, foreign income and capital gains earned during the year for each specific asset grouped by type of asset in each foreign jurisdiction. If your foreign investments are held through a financial institution, they can provide a foreign asset report.) ☐ Yes ☐ No

6. Regular Income and Deductions

T4 slips - Employment income? ☐ Yes ☐ No

Any Employment income or taxable benefits not shown on the T4 slip? Provide details. _____

T4A Commission and self-employment? ☐ Yes ☐ No

T4E - Employment insurance? ☐ Yes ☐ No

T4A - Other income? ☐ Yes ☐ No

Amounts paid for union and professional dues (with receipts) ☐ Yes ☐ No

Listing of childcare expenses, with receipts, summarized for each child? ☐ Yes ☐ No

Listing of moving expenses paid and for whom? ☐ Yes ☐ No

Listing of spousal support payments made or received? ☐ Yes ☐ No

Is a signed Form T2200 (Employment expenses) If yes, provide a summary of the allowable employment expenses incurred. ☐ Yes ☐ No

Detailed Method – provide the following for Home Office expenses:

- Work space area (sqft)
- Total home area (sqft)
- Is your workspace a common (shared area)? ☐ Yes ☐ No
 - If yes, how many hours worked in that shared space per week? _____

7. 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 (RRSP income) or T4RIF – (RRIF income)? ☐ Yes ☐ No

Pension splitting - Does the taxpayer elect to split eligible pension income with spouse or common-law partner? ☐ Yes ☐ No

8. Investment Income/Deductions

T3 - Income from trust allocations? ☐ Yes ☐ No

T5 - Investment income? ☐ Yes ☐ No

T4PS - Income from profit sharing plans or other applicable T slips? ☐ Yes ☐ No

T5013 - Partnership income? ☐ Yes ☐ No

T5008 - Income from securities transactions or summary of investment dispositions with regard to capital gains /losses during the year (these reports can be produced by your bank or brokers or through online bank reporting)? ☐ Yes ☐ No

Provide summary of interest and/or management fees paid to earn investment income or accounting/legal fees (with description of the expense to allow us to determine if deductible)? ☐ Yes ☐ No

Did the taxpayer **dispose of property or other investments** during the year (excluding any residences that were your personal residence at any time in the year)? If so, provide the following details:

Description of Property	Acquisition date	Disposal date	Proceeds	Cost	Disposal costs

Did the taxpayer **dispose of any property during the tax year that was used as a principal residence** at any time in the year or prior years? If so, provide the following details:

Description of Property	
Acquisition date	
Disposition date	
Proceeds	
Adjusted cost base at the time of disposition	
Disposal costs	
Which years was this property designated as a principal residence?	
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	

9. Rental Income

If the taxpayer owned rental property, is a schedule of rental income and expenses included?

☐ Yes ☐ No

Does the taxpayer use a portion of any rental properties as their personal residence?

☐ Yes ☐ No

Was there any change in the use of any properties you owned during the year?
Please provide details.

☐ Yes ☐ No

10. Self-Employment/Business Income

- Schedule of revenue and expenses included? ☐ Yes ☐ No
- If an owner/manager, did the taxpayer have a shareholder loan outstanding during the year? ☐ Yes ☐ No
- If the taxpayer used a vehicle for business, are the vehicle expenses summarized by type along with both total and business mileage included? ☐ Yes ☐ No
- If the taxpayer used a portion of his/her home for business, are the home expenses along with both total and business square footage included? ☐ Yes ☐ No
- Is a list of all asset additions and disposals (including cars, equipment, etc.) included? ☐ Yes ☐ No
- Did you receive any COVID related benefits for wage subsidy, rent or other related to your Self-employment income? ☐ Yes ☐ No

11. RRSP (Registered Retirement Savings Plan) contributions

- Receipts for contributions made included? ☐ Yes ☐ No
- Were any amounts repaid during the year to a home buyers' plan or a lifelong learning plan? ☐ Yes ☐ No
- Are you a first-time home buyer or acquiring a home for a related person with a disability – you may qualify for a tax credit? Contact us for more details. ☐ Yes ☐ No

12. Other Credits

- T2202 Tuition amount for taxpayer or being claimed on transfer from dependent? ☐ 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 included? For efficiency – please obtain full year summaries for prescriptions from pharmacies and dental care as this avoids extra time spent to prepare. ☐ Yes ☐ No
- Receipts for charitable donations or in-kind donations in kind (provide a list with copies of donations)? ☐ Yes ☐ No
- Receipts for political contributions? ☐ Yes ☐ No
- List of eligible teaching supplies purchased (for teachers or early childhood educators only)? ☐ Yes ☐ No
- Receipts for the digital news subscription credit? ☐ Yes ☐ No
- Amount of property taxes/rent paid in the year and name of landlord/municipality? ☐ Yes ☐ No

13. Other information and CRA Correspondence (if applicable)

Is a copy of the Notice of Assessment for last year's tax return included?

☐ Yes ☐ No

Any Notices of Reassessment for prior years? Please include.

☐ Yes ☐ No

Would you like to register for direct deposit from CRA, if yes please provide a copy of a void cheque?

☐ Yes ☐ No

Is your statement of income tax instalments paid for the year included? Or provide details.

☐ Yes ☐ No

Did you declare personal bankruptcy or put forth a proposal?

☐ Yes ☐ No

If yes, provide the date and other pertinent details _____