

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 (mm/dd/yyyy)	Phone	
			Mobile or office	Ext
Taxpayer				
Spouse				
Address			Home Phone	

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: enter date.

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. Dependants (if any changes – new additions during taxation year)

Name	Relation	Date of Birth (mm/dd/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. Foreign Reporting - T1135

Did the taxpayer own or hold foreign property with a total cost between CANS100,000 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.) 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.) Yes No

****We highly recommend that where specified foreign property is held with investment brokers or financial institutions, you obtain foreign property reports from them as this will save time and money in preparing these forms.***

5. Rental Income

If the taxpayer owned rental property, is a schedule of rental income and expenses included? Yes No

Do you own any **short-term rental properties** or earn **short term rentals** from a cottage, ski chalet or list your property for rent on AirBnB or similar platforms? [READ MORE.](#) Yes No

If YES to above, are you permitted to rent out due to provincial or municipal law and/or did you obtain a permit before December 31st of this past year Yes No

If NO, the short-term rental expenses will not be deductible.

In any case, if you have a short-term rental, you will be required to provide us with segregated short-term rental information as follows:

- Gross rents from short-term rental
- Expenses for short-term rental
- Full address
- Number of days short-term rental non-compliant and;
- Number of days the property was a short-term rental.

Does the taxpayer use a portion of any rental properties as their personal residence, if yes, Please provide the percentage of personal use? Yes No

Was there any change in the use of any properties you owned during the year?

Please provide details.

Yes No

6. Capital gains – real estate, stocks, mutual funds, cryptocurrency or bond transactions

Please obtain a Capital Gain and Loss report from your broker this is the most efficient method to report capital gains or losses for the year. As an alternative, you may obtain an Annual Transaction Report as long as it contains all of the adjusted cost bases for all dispositions in the year.

A reminder that transactions involving cryptocurrency whether in an investment capacity or as a business will likely be taxable (see [CRA article](#) and if this applies please discuss with a fellow HSM Team member).

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 as mentioned above*)?

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	

7. 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

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

8. 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

9. Regular Income and Deductions

T4 slips - Employment income? Yes No

Any Employment income or taxable benefits not shown on the T4 slip? Provide details. [Click to enter text.](#)

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

10. Employment expenses

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:

- Workspace 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? Enter number.

11. 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

12. 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

13. 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 and provide in an organized manner in an electronic format – pdf or scan preferably. Yes
No

Receipts for **charitable donations** or in-kind donations in kind (provide a list with copies of donations in an electronic format)? 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

14. 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

15. 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: [Click to enter text.](#)