

# 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	Click to enter text.	Click to enter text.	enter date	Click to enter text.	Enter
Spouse	Click to enter text.	Click to enter text.	enter date	Click to enter text.	Enter
Address	Click to enter text.			Home Phone	Click to enter text.

Name of taxpayer, spouse and dependents	Email addresses
Click to enter text.	Click to enter text.
Click to enter text.	Click to enter text.
Click to enter text.	Click to enter text.
Click to enter text.	Click to enter text.
Click to enter text.	Click to enter text.

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)?
Click to enter text.	enter	enter date	Click to enter text.	select	select
Click to enter text.	enter	enter date	Click to enter text.	select	select
Click to enter text.	enter	enter date	Click to enter text.	select	select
Click to enter text.	enter	enter date	Click to enter text.	select	select
Click to enter text.	enter	enter date	Click to enter text.	select	select

## 3. Residence (if any changes)

Province or territory of residence on December 31: [select](#)

Did the taxpayer immigrate to Canada or emigrate from Canada during the year?  Yes  No

If yes, provide date of entry into Canada: [enter date](#) or date of departure: [enter date](#)

#### 4. Foreign Reporting - T1135

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Did the taxpayer own or hold foreign property with a total cost between CANS100,000 and CANS250,000 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 CANS250,000 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

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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 31<sup>st</sup> 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**

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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
Click to enter text.	enter date	enter date	Enter number.	Enter number.	Enter number.
Click to enter text.	enter date	enter date	Enter number.	Enter number.	Enter number.
Click to enter text.	enter date	enter date	Enter number.	Enter number.	Enter number.
Click to enter text.	enter date	enter date	Enter number.	Enter number.	Enter number.

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	Click to enter text.
Acquisition date	enter date
Disposition date	enter date
Proceeds	Enter number.
Adjusted cost base at the time of disposition	Enter number.
Disposal costs	Enter number.
Which years was this property designated as a principal residence?	Enter year range
If owned prior to 1982, fair market value of property as at December 31, 1981	Enter number.
If owned prior to 1982, adjusted cost base of property as at December 31, 1981	Enter number.

**7. Investment Income/Deductions**

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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

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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

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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

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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

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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

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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

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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

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)**

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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)**

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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.](#)