PERSONAL TAX ORGANIZER
For the year _____

Please complete this T1 Organizer before your appointment. Please attach all applicable slips, lists, and other supplemental information.

1. Personal Information

	Name	SIN	Date of Birth (dd/mm/yy)	Phone Office	Ext.
Taxpayer					
Spouse					
Address				Home	
				Mobile	
E-mail:					

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

If your marital status changed during the year, 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 the date of entry into Canada _____ or the 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

Did the taxpayer own or hold foreign property with a total cost of more than CDN$100,000 at any time during the year? If yes, please provide a list. ☐ Yes ☐ No

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	Disability Amount	Income	Child Care Expenses

Universal Child Care Benefits (UCCB) – Is the RC62 slip attached? ☐ Yes ☐ No

If the taxpayer is a single parent, is the UCCB designated to a dependant? ☐ Yes ☐ No

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 and organization of union/professional dues? _____

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/T5013(A) – Partnership income? ☐ Yes ☐ No

T5008 – Income from securities transactions? ☐ Yes ☐ No

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

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

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 and repayments: _____		
If the taxpayer used a vehicle for business, are the vehicle expenses and both total and business mileage information 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 information attached?	☐ Yes	☐ No
Is a list of all new asset additions attached?	☐ Yes	☐ No

11. Rental Income

If the taxpayer owned rental property, is a statement of rental income attached?	☐ Yes	☐ No

12. RRSP Contributions

T-slip for contributions made attached?	☐ Yes	☐ No

13. Other Credits

T2202 – Tuition/education amount for the taxpayer?	☐ Yes	☐ No
T2202 – Tuition/education amount claimed on transfer from the dependant?	☐ Yes	☐ No
Receipt or amount for the taxpayer's student loan interest?	☐ Yes	☐ No
Receipts/Listing of all medical expenses paid in the year for the taxpayer, spouse, and dependants?	☐ Yes	☐ No
Receipts for donations?	☐ Yes	☐ No
Receipts for charitable donations made by way of gifting an item in kind?	☐ Yes	☐ No
Were any loans associated with the charitable donations?	☐ Yes	☐ No
Receipts for political contributions?	☐ Yes	☐ No
Tickets for public transit?	☐ Yes	☐ No
Receipts/listing for fitness amount paid for each child?	☐ Yes	☐ No
Receipts/listing for activities paid for each child?	☐ Yes	☐ No
Statement for new home to claim the home buyer's amount?	☐ Yes	☐ No
Amount of property taxes/rent paid in the year?	☐ Yes	☐ No

14. Prior Year Tax Return Information/Correspondence

Is a copy of the Notice of Assessment for last year's tax return attached?	☐ Yes	☐ No
If new to the firm, are tax returns (and corresponding Notices of Assessment) for the last three years attached?	☐ Yes	☐ No
If the taxpayer claimed a loss carryback in any of the preceding three years, are the Notices of Reassessment for those years attached?	☐ Yes	☐ No
Is a copy of any other correspondence from the Canada Revenue Agency attached?	☐ Yes	☐ No
If you would like your tax refund deposited directly into your account, is a void cheque attached?	☐ Yes	☐ No
Is your statement of instalments paid for the year attached?	☐ Yes	☐ No