

PERSONAL TAX ORGANIZER FOR THE YEAR 2017

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

1. Personal Information

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

Marital Status: Married Single Common-law Separated Divorced Widowed

If married or common-law, should your return be filled jointly with your spouse's return? Yes No

If marital status changed during the year, provide date of change (mm/dd/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 date of entry into Canada or 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 – 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? 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? Yes No

If yes, please provide us with a list and all relevant details.

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:

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6. Dependants

Name	Relationship	Date of Birth (dd/mm/yy)	SIN	Physically or Mentally Infirm?	DTC Approved?	Income	Child Care Expenses
				Yes	Yes		
				Yes	Yes		
				Yes	Yes		
				Yes	Yes		
				Yes	Yes		
				Yes	Yes		

Universal child care benefits (UCCB) – Is RC62 slip attached? Yes No

If the taxpayer is a single parent, is the UCCB designated to a dependent? 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?

Provide us with the amount paid for union and professional dues as well as the names of the organizations?

List of child care expenses, with receipts, for each child? Yes No

List of moving expenses paid? Yes No

List of spousal support payments made or received? Yes No

List of deductible employment expenses? Yes No

Is a signed form T2200 attached? Yes No

Signed receipt with SIN if individual caregiver? Yes No

8. 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 – Registered retirement savings 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

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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 – Partnership income?	Yes	No
T5008 – Income from securities transactions?	Yes	No

Did the taxpayer dispose of property or investments (including a principal residence) during the year? If so, provide the following details in a separate list:

Description of Property & Quantity	Date Acquired	Date Disposed of	Sales Proceeds	Cost	Expenses for Disposal
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Interest paid to earn investment income

Management Fees

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, repayments, and year-end balance if owner/manager owes the company money:

If the taxpayer used a vehicle for business, are the vehicle expenses and both total and business mileage 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 attached?	Yes	No
Is a list of all assets additions and disposals (including cars, equipment, etc.) attached?	Yes	No

11. Rental Income

If the taxpayer owned rental property, is a statement of rental income attached?	Yes	No
Does the taxpayer also live in the rental property (in which no CCA should be claimed)?	Yes	No

12. RRSP/pool registered pension plan (PRPP) Contributions

T-slip for contributions made attached?	Yes	No
Where any amounts repaid during the year to a home buyers' plan or lifelong learning plan?	Yes	No

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13. Other Credits

T2202 – Tuition/education amount for taxpayer?	Yes	No
T2202 – Tuition/education amount claimed on transfer from dependent?	Yes	No
Receipt of amount for taxpayer’s student loan interest?	Yes	No
Receipts/listing of all medical expenses paid in the year for taxpayer, spouse, and dependents?	Yes	No
First-time making charitable donations?	Yes	No
Receipts for charitable donations or 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
List of eligible teaching supplies purchased (for teachers and early childhood educators only)?	Yes	No
Public transit passes (receipts/details)?	Yes	No
Receipts/listing for fitness and arts activity amounts paid for each child?	Yes	No
Information pertaining to the purchase of a new home to claim the first-time home buyer’s amount?	Yes	No
Amount of property taxes/rent paid in the year and name of landlord/municipality?	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 taxpayer claimed a loss carry-back in any of the preceding 3 years, are the Notice 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 and if you have not already registered for direct deposit, is a void cheque attached?	Yes	No
Is your statement of installments paid for the year attached?	Yes	No

15. Future Offer’s/Correspondence

I agree to receive future electronic communications from Mount Albert Tax Company / Holland Landing Tax Company about products and services that may be of interest to me based on my answers to this form. I understand that these communications will not be excessive and that I can withdraw my consent at any time.

I agree