

PERSONAL INCOME TAX ORGANIZER

For the Year _____

Completing income taxes can seem like a daunting task, even with the help of an accountant. The following checklist can be used to help ensure you have the right information and documents to **make this tax season a smooth one.**

Call (289) 288-1206 To Arrange Your Appointment

1. Personal Information

	Name	SIN	Date of Birth (dd/mm/yy)	Phone	
				Office	Ext
You					
Your Spouse					
Address				Home:	
				Cell:	
E-Mail					

Marital status:

- Married
 Common-law
 Divorced
 Single
 Separated
 Widowed

If your marital status changed during the year, please provide the date of the change (dd/mm/yy):

2. Residency & Citizenship

Province or territory of residence on December 31, _____

Current province or territory of residence (If different from above): _____

Did you move to Canada or from Canada during the tax year? Yes No

If yes, please provide the date of entry (dd/mm/yy) _____ or date of departure (dd/mm/yy) _____

Are you a Canadian citizen? Yes No

If yes, do you authorize the CRA to provide your name, address and date of birth to the National Registrar of Electors? Yes No

Are you a U.S. citizen or Green Card holder? Yes No

3. Foreign Reporting

Do you own foreign property, including foreign stocks held in Canadian brokerage accounts, with a total cost of more than \$100,000 CDN at any time during the year? Yes No

If yes, please provide a list.

4. Changes in Personal / Financial Situation

Date of bankruptcy (if applicable): _____

Have you borrowed funds to make an investment into a business or investment portfolio? Yes No

Have you closed an investment account during the year? Yes No

Have you sold any stocks, bonds, mutual funds, or other investments during the year? Yes No

5. Dependents

Name	Relationship	Date of Birth (dd/mm/yy)	SIN	Income	Disability	Child Care Expenses
					<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Universal Child Care Benefits (UCCB) – Is the RC62 Attached?

Yes No

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

Yes No

6. General Income

T4 Slips – Employment income?

Yes No

T4A – Commission and self-employment?

Yes No

T4E – Employment insurance?

Yes No

T5007 – Workers compensation or social assistance slips?

Yes No

Employment income or taxable income 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 T2200 - Declaration of conditions of employment attached?

Yes No

7. Pension Income

T4A – Pension, retirement and annuity income?

Yes No

T4AP – Canada Pension Plan (CPP) benefits?

Yes No

T4A(OAS) – Old age security benefits?

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

Do you want to make an election to split your pension income with your spouse or common law partner?

Yes No

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8. Investment Income & Deductions

- T3 – Income from trust allocations (or mutual funds)? 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 you sell any investment property during the year? If so, please provide the following details in a separate list:

Description of Property	Date Acquired	Date Disposed	Sale proceeds	Cost	Expense for Disposal

Interest paid to earn investment income _____ Rental fee on safe deposit box _____ Accounting / legal fees _____

9. Self-Employment / Business Income

- Financial statements or schedule of revenue and expenses attached? Yes No
- Have you registered to be eligible for employment insurance benefits? Yes No
- Do you have any shareholder loans outstanding? Yes No
- If yes, provide details of borrowings and repayments: _____
- If you used a vehicle for business, are the expenses and both total and business mileage attached? Yes No
- If you used a portion of your home for business, are the home expenses and both total and business square footage attached? Yes No
- Is a list of new asset additions attached? Yes No

10. Rental income

- Have you attached the address and number of units of each rental property? Yes No
- Is a statement or schedule of rental income and rental expenses by category attached? Yes No
- Are your rental properties owned others? Yes No
- If so, please provide the partners names, addresses and SIN's.

11. RRSP Contributions

- If you made contributions to your RRSP's, have you attached the contribution receipts? Yes No

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12. Other Credits

- T2202 – Tuition/education for yourself? Yes No
- T2202 – Tuition/education amount claimed on transfer from a dependent? Yes No
- Receipt or amounts for your student loan(a)? Yes No
- Receipts/Listing of all medical expenses paid in the year for yourself, your spouse, and dependents? Yes No
- Donation receipts? Yes No
- Donation receipts for donations made “in-kind”? Yes No
- Were there 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 amounts for each child? Yes No
- Receipts/listing for activities for each child? Yes No
- Statement for new home to claim the home buyer’s amount? Yes No
- Amount of property taxes paid in the year? Yes No

13. Prior Year Tax Return / Correspondence

- Is a copy of the Notice of Assessment for last year’s tax return attached? Yes No
- If you are a new client, are tax returns (and the corresponding Notices of Assessment) for the last three years attached? Yes No
- If you claimed a loss carryback in any of the last three years, are copies of the Notices of Reassessment 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 to your account, have you attached a void cheque? Yes No
- Is your statement of installments paid for the year attached? Yes No

If you have any questions about your income tax return, please contact our office at (289) 288-1206.