

**PERSONAL TAX ORGANIZER**  
**For the year 2018**

Please complete this T1 Organizer before your appointment. 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:	
Email:					

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 marital status changed during this 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 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 of more than CDN \$100,000 at any time during the year?  Yes  No

If yes, please provide a list and relevant details.

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## 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 (dd/mm/yy)	SIN	Physical or mental impairment?	Income	Child Care Expenses

Tuition Credit transfer

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 paid for union and professional dues and organization names? \_\_\_\_\_

List of child care expenses, with receipts, for each child?

Yes

No

List of moving expenses paid in the year?

Yes

No

*Moving expenses must have been to work or to run a business at a new location or to take Courses as a student in full-time attendance in university or college*

List of support payments made or received?

Yes

No

List of deductible employment expenses? (see APPENDIX B)

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

Did the taxpayer dispose of property or investments during the year? If so, provide the following details in a separate list:  
***This includes property for which the principal residence exemption is claimed***

Description and Quantity of Property	Date Acquired (dd/mm/yy)	Date Disposed of (dd/mm/yy)	Sales Proceeds	Cost	Expenses for Disposal

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? (see APPENDIX A)  Yes  No
- Has the taxpayer registered to be eligible for Employment Insurance special benefits?  Yes  No
- If the taxpayer used a vehicle for business, are the vehicle expenses and both total and business mileage attached? (see APPENDIX D)  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? (see APPENDIX D)  Yes  No
- Is a list of all asset additions and disposals (including cars, equipment, etc.) attached?  Yes  No

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**11. Rental Income**

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If the taxpayer owned rental property, is a statement of rental income attached? (see APPENDIX C)  Yes  No

Does the taxpayer also live in the rental property and choose not to claim CCA?  Yes  No

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**12. RRSP / PRPP Contributions**

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T-slip for contributions made attached?  Yes  No

Were any amounts repaid during the year to a home buyer's plan or a lifelong learning plan?  Yes  No

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**13. Other Credits**

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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?  Yes  No

Receipts for charitable donations or donations made by way of gifting an item in kind?  Yes  No

Receipts for political contributions?  Yes  No

Did you Adopt a child in the year?  Yes  No

Are you a Volunteer Firefighter or Search and Rescue?  Yes  No

Were you or an eligible dependent enrolled in University in the year?  Yes  No

Are you a BC teacher that carried on at least 10 hours of unpaid coaching in the year?  Yes  No

Are you a first time home buyer in the year?  Yes  No

Receipts to renovate home for Seniors or a person with Disabilities?  Yes  No

Are you an apprentice enrolled in an Industry Training Authority program in the year?  Yes  No

Statement for new home to claim the home buyer's amount if first-time home buyer?  Yes  No

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**14. Prior Year Tax Return Information/Correspondence**

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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 carryback in any of the preceding 3 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