PERSONAL TAX ORGANIZER

tax year 2015

**Personal Information**

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ SIN: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date of Birth: \_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Spouse: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ SIN: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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 married or common-law and we are not preparing spouse’s return,

please indicate spouse’s net income: $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

If your marital status changed during the year, provide date of change: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Residence**

Province or territory of residence on December 31: ­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Did you 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: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Elections Canada**

Are you a Canadian citizen? \_\_ Yes \_\_ No

If yes, do you authorize the CRA to provide your name, address and \_\_ Yes \_\_ No

date of birth to Elections Canada to update your information on the

National Register of Electors

**Foreign Reporting**

Did you own or hold foreign property with a total cost of more than CDN$100,000 \_\_ Yes \_\_ No

at any time during the year?

**Dependents**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **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 you are a single parent, is the UCCB designated to a dependant? \_\_ Yes \_\_ No

**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? \_\_ 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

**Retirement 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

U.S. Social Security or other foreign pension income? \_\_ Yes \_\_ No

Do you elect to split eligible pension income

with your spouse or common-law partner? \_\_ Yes \_\_ No

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

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Description of Property** | **Date Acquired** | **Date Disposed** | **Proceeds** | **Cost** | **Expenses** |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

Interest paid to earn investment income $ \_\_\_\_\_\_\_\_\_\_\_\_

Rental fee on safety deposit box $ \_\_\_\_\_\_\_\_\_\_\_\_

Accounting/legal fees for investments $ \_\_\_\_\_\_\_\_\_\_\_\_

**Self-Employment/Business Income**

Financial statements(s)/ schedule of revenue and expenses attached? \_\_ Yes \_\_ No

Are you GST/HST registered? \_\_ Yes \_\_ No

Have you registered to be eligible for

employment insurance special benefits? \_\_ Yes \_\_ No

If an owner/manager, did you have loan from the

Business outstanding during the year? \_\_ Yes \_\_ No

If you used a vehicle for business, are the vehicle expenses

and both total and business mileage information attached? \_\_ Yes \_\_ No

If you used a portion of your 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

**Rental Income**

If you owned rental property, is a statement of rental income attached? \_\_ Yes \_\_ No

**RRSP Contributions**

Receipts for RRSP contribution(s) attached? \_\_ Yes \_\_ No

**Federal and Provincial Tax Credits**

T2202 – Tuition/education amount for you?

T2202 – Tuition/education amount claimed on transfer from the dependant?

Receipt or amount for your student loan interest?

Receipts/listing of all medical expenses paid in the year for you,

Spouse, and dependants?

Receipts for charitable donations?

Receipts for political contributions?

Tickets for public transit?

Receipts/listing for fitness amount paid for each child?

Receipts/listing for activities paid for each child?

Statement for new home to claim the home buyer’s amount?

Amount of property taxes/rent paid in the year? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Prior Year Tax Returns and CRA 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 you 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 are not already set up for direct deposit with the CRA and would like

to do so, is a void cheque attached? \_\_ Yes \_\_ No

Is your statement of instalments paid for the year attached? \_\_ Yes \_\_ No