

PERSONAL TA	X RETURN ORGANIZER
For the year	

Please complete this T1 Organizer before your appointment.

1. Personal Information							
Name	SIN	Date of Birth	Phone (Bus.)				
Taxpayer							
Spouse							
Address			Phone (Res.)				
Marital Status: Married Single Common-la	w Separated	Divorced	Widowed				
If married or common-law, should your tax return be filed jointly with you	Yes	No					
2. Elections Canada							
The taxpayer authorizes the CRA to provide his/her name, address, and de Elections Canada to update his/her information on the National Register of		Yes	No				
3. Foreign Reporting							
Did the taxpayer own or hold foreign property with a total cost of more th any time during the year?	an \$100,000CAN at	Yes	No				
4. Change in Personal or Financial Situation During	g the Year						
Did the taxpayer's marital status change during the year?		Yes	No				
Did the taxpayer immigrate to Canada or emigrate from Canada during th If yes, provide:	Yes	No					
or date of departure							
Did the taxpayer become deceased during the year?	Yes	No					
If yes, provide: date of death							
Did the taxpayer declare bankruptcy during the year?	Yes	No					
Did the taxpayer refinance a business with new or revised debt?		Yes	No				
Did the taxpayer close a bank account or investment account?  Yes							
If yes, provide details:							



5. Dependants					
Name	Relationship	Date of Birth	SIN	Disability Amount	Income

6. Employment Income	/Deductions			
Did the taxpayer earn income from	employment?		Yes	No
If yes, are T4 slips attach	ed?		Yes	No
Did the taxpayer receive Employme	ent Insurance?		Yes	No
If yes, is the T4E slip atta	ched?		Yes	No
Did the taxpayer receive taxable be	enefits not shown on the 1	Γ4 slip?	Yes	No
Did the taxpayer receive any employment income in the form of commission?			Yes	No
Did the taxpayer receive a GST reb	ate?		Yes	No
If yes, amount received:		_		
Did the taxpayer pay union/profess	ional dues?		Yes	No
If yes, provide details:				
Is the taxpayer claiming deductible	employment expenses?		Yes	No
If yes, is a signed T2200 attached?			Yes	No
Does the taxpayer participate in an employee profit-sharing plan?			Yes	No
If yes, is the T4PS slip attached?			Yes	No
7. Pension Income				
Did the taxpayer receive pension in	come?		Yes	No
If yes, are the appropriate	e T slips attached?		Yes	No
Old Age Security T4(OAS)	CPP/QPP T4A(P)	Pension T4A	RRSP /RPP /RRIF T4R	SP/T4RRIF
8. Investment Income/	'Deductions			
Did the taxpayer earn investment in	ncome?		Yes	No
If yes, are the appropriate	e T slips attached?		Yes	No
Interest (T5/T600)	Dividends (T5)	Estate/Trust (T3)	Partnership/Tax Shelter	rs (T101/T5013)



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

Active terminal income deposit box legal fees  Self-Employment/Business Income  Sas the taxpayer self-employed during the year?  As the taxpayer self-employed during the year?  As the taxpayer self-employed during the year?  As the taxpayer self-employed during the year?  Yes No an owner/manager, did the taxpayer have a shareholder loan outstanding during the year?  As a shareholder loan outstanding during the year?  As a nowner/manager, did the taxpayer have a shareholder loan outstanding during the year?  As a nowner/manager, did the taxpayer have a shareholder loan outstanding during the year?  As a nowner/manager, did the taxpayer have a shareholder loan outstanding during the year?  Are shareholder loan outstanding during the year?  Are appropriate T slip attached?  Are appropriate details disclosed in an attached?  Are appropriate documentation attached?	Description of Property	Date Acquired	Date Disposed	Sale Proceeds	Cost	Expenses for Dispo
vestment income deposit box legal fees  Self-Employment/Business Income  as the taxpayer self-employed during the year? Ves No If yes, is (are) the appropriate self-employment statement(s) attached? Ves No an owner/manager, did the taxpayer have a shareholder loan outstanding during the year? Ves No If yes, provide details of borrowings and repayments:  O. Rental Income  If yes, is a statement of rental income? If yes, is a statement of rental income attached? Ves No If yes, is a statement of rental income attached? Ves No If yes, is the T slip and other documentation attached? Yes No If yes, is the T slip and other documentation attached? Yes No ature of RRSP contribution: Contribution to personal RRSP Contribution to spousal RRSP  2. Other Items  if yes, is the appropriate T slip attached? Yes No If yes, is the appropriate T slip attached? Yes No If yes, is the appropriate T slip attached? Yes No If yes, is the appropriate T slip attached? Yes No If yes, is the appropriate of transfer from dependant? Yes No If yes, is the appropriate details disclosed in an attached schedule? Yes No If yes, is the appropriate details disclosed in an attached schedule? Yes No If yes, is the appropriate documentation attached? Yes No If yes, is the appropriate documentation attached? Yes No If yes, is the appropriate documentation attached? Yes No If yes, is the appropriate documentation attached? Yes No If yes, is the appropriate documentation attached? Yes No If yes, is the appropriate documentation attached? Yes No If yes, is the appropriate documentation attached? Yes No If yes, is the appropriate documentation attached? Yes No						
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If yes, is (are) the appropriate self-employment statement(s) attached?  Yes No If yes, provide details of borrowings and repayments:  O. Rental Income Id the taxpayer have rental income? If yes, is a statement of rental income attached?  Yes No If yes, is a statement of rental income attached?  Yes No If yes, is the T slip and other documentation attached?  Yes No If yes, is the T slip and other documentation to personal RRSP  Contribution to spousal RRSP  2. Other Items  If yes, is the appropriate T slip attached?  Yes No If yes, is the appropriate T slip attached?  Yes No If yes, is the appropriate T slip attached?  Yes No If yes, is the appropriate T slip attached?  Yes No If yes, is the appropriate T slip attached?  Yes No If yes, is the appropriate T slip attached?  Yes No If yes, is the appropriate T slip attached?  Yes No If yes, is the appropriate T slip attached?  Yes No If yes, is the appropriate T slip attached?  Yes No If yes, is the appropriate T slip attached?  Yes No If yes, is the appropriate T slip attached?  Yes No If yes, is the appropriate details disclosed in an attached schedule?  Yes No If yes, is the appropriate documentation attached?  Yes No If yes, is the appropriate documentation attached?  Yes No If yes, is the appropriate documentation attached?  Yes No If yes, is the appropriate documentation attached?  Yes No	9. Self-Employment	Business Inco	ome			
an owner/manager, did the taxpayer have a shareholder loan outstanding during the year?  If yes, provide details of borrowings and repayments:  O. Rental Income  Id the taxpayer have rental income?  If yes, is a statement of rental income attached?  Yes No  If yes, is a statement of rental income attached?  Yes No  If yes, is the T slip and other documentation attached?  Yes No  atture of RRSP contribution:  Contribution to personal RRSP  Contribution to spousal RRSP  Litton/Education amount for self?  Yes No  If yes, is the appropriate T slip attached?  Yes No  If yes, is the appropriate T slip attached?  Yes No  Are appropriate details disclosed in an attached schedule?  Yes No  If yes, is the appropriate documentation attached?  Yes No  If yes, is the appropriate documentation?  Yes No  If yes, is the appropriate documentation attached?  Yes No  If yes, is the appropriate documentation attached?  Yes No  If yes, is the appropriate documentation attached?  Yes No  If yes, is the appropriate documentation attached?  Yes No  If yes, is the appropriate documentation attached?  Yes No  If yes, is the appropriate documentation attached?  Yes No  Yes No  Yes No	Vas the taxpayer self-employed	d during the year?			Υ	es No
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O. Rental Income  If yes, is a statement of rental income attached?  Yes No  If yes, is a statement of rental income attached?  Yes No  If yes, is a statement of rental income attached?  Yes No  If yes, is the T slip and other documentation attached?  Yes No  ature of RRSP contribution:  Contribution to personal RRSP  Contribution to spousal RRSP  Contribution to spousal RRSP  2. Other Items  If yes, is the appropriate T slip attached?  Yes No  If yes, is the appropriate T slip attached?  Yes No  If yes, is the appropriate T slip attached?  Yes No  If yes, is the appropriate T slip attached?  Yes No  If yes, is the appropriate T slip attached?  Yes No  If yes, is the appropriate details disclosed in an attached schedule?  Yes No  If yes, is the appropriate documentation attached?  Yes No  If yes, is the appropriate documentation attached?  Yes No  If yes, is the appropriate documentation attached?  Yes No  Te emedical expenses claimed?  Yes No	f an owner/manager, did the t	axpayer have a shar	eholder loan outsta	nding during the y	/ear? Y	es No
If yes, is a statement of rental income attached?  Tes No If yes, is a statement of rental income attached?  Tes No If yes, is a statement of rental income attached?  Tes No If yes, is the T slip and other documentation attached?  Tes No atture of RRSP contribution:  Contribution to personal RRSP Contribution to spousal RRSP  Contribution to spousal RRSP   Contribution to spousal RRSP  If yes, is the appropriate T slip attached?  Yes No If yes, is the appropriate T slip attached?  Yes No If yes, is the appropriate T slip attached?  Yes No If yes, is the appropriate T slip attached?  Yes No If yes, is the appropriate T slip attached?  Yes No If yes, is the appropriate T slip attached?  Yes No If yes, is the appropriate details disclosed in an attached schedule?  Yes No If the taxpayer pay interest on a student loan?  Are appropriate details disclosed in an attached schedule?  Yes No If yes, is the appropriate documentation attached?  Yes No If yes, is the appropriate documentation attached?  Yes No Te emedical expenses claimed?  Yes No Te emedical expenses claimed?  Yes No	If yes, provide details	of borrowings and r	epayments:			
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11. RRSP Contributions  If the taxpayer make an RRSP contribution during the year?  If yes, is the T slip and other documentation attached?  Yes No atture of RRSP contribution:  Contribution to personal RRSP  Contribution to spousal RRSP  2. Other Items  Litton/Education amount for self?  Yes No  If yes, is the appropriate T slip attached?  Yes No  If yes, is the appropriate T slip attached?  Yes No  If yes, is the appropriate T slip attached?  Yes No  Are appropriate details disclosed in an attached schedule?  Yes No  If yes, is the appropriate documentation attached?  Yes No  The child care expenses claimed?  Yes No  If yes, is the appropriate documentation attached?  Yes No  The medical expenses claimed?  Yes No  Yes No  The medical expenses claimed?  Yes No	id the taxpayer have rental in	come?			Υ	es No
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2. Other Items  Lition/Education amount for self?  If yes, is the appropriate T slip attached?  Yes  No  If yes, is the appropriate T slip attached?  Yes  No  Are appropriate details disclosed in an attached schedule?  Yes  No  If yes, is the appropriate details disclosed in an attached?  Yes  No  If yes, is the appropriate documentation attached?  Yes  No  If yes, is the appropriate documentation attached?  Yes  No	id the taxpayer make an RRSF	contribution during	the year?		Υ	es No
2. Other Items  uition/Education amount for self?  If yes, is the appropriate T slip attached?  If yes, is the appropriate T slip attached?  If yes, is the appropriate T slip attached?  Yes  No  If yes, is the appropriate T slip attached?  Yes  No  id the taxpayer pay interest on a student loan?  Are appropriate details disclosed in an attached schedule?  Yes  No  Te child care expenses claimed?  Yes  No  If yes, is the appropriate documentation attached?  Yes  No  re medical expenses claimed?  Yes  No	If yes, is the T slip and other documentation attached?			Υ	es No	
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	If yes, is the appropriate documentation attached?			Υ	es No	
If yes, is the appropriate documentation attached?  Yes  No	re medical expenses claimed?				Υ	es No
	If yes, is the appropri	ate documentation a	ttached?		Υ	es No



Are charitable donations claimed?			No
	Are donation slips attached?	Yes	No
	Were any charitable donations made by way of gifting an item in-kind?	Yes	No
	Were any loans associated with the charitable donation?	Yes	No
Are political contributions claimed?		Yes	No
	Are donation slips attached?	Yes	No
Was ta	x paid by instalments?	Yes	No
	If yes, has the taxpayer provided information on the amount paid?	Yes	No

## 13. Prior Year Tax Return Information/Correspondence Is a copy of last year's tax return attached? Yes No Is a copy of the Notice of Assessment for last year's tax return attached? Yes No Are you a new client of the firm? Yes No If yes, are tax returns for the last three years (and corresponding Notices of Assessment) attached? Yes No Other than the Notice of Assessment for your tax return, did you receive any other correspondence from the Canada Revenue Agency? Yes No Is a copy of this correspondence attached? Yes No