

# PERSONAL TAX ORGANIZER for the taxation year of 20\_\_

You may complete this form on your computer. Once you are finished, save and print it.  
Please attach all applicable slips, receipts, lists, and other supplemental information and submit it to our office.  
This will save us time in preparing your tax return.

## 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 the 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 between CDN \$100,000 and \$250,000 at any time during the year? If yes, please provide total foreign income and capital gains earned during the year.  Yes  No

Did the taxpayer own or hold foreign property with a total cost of more than CDN \$250,000 at any time during the year?  Yes  No

If yes, please provide a detailed list of all income and capital gains earned during the year.

## 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	SIN	Physically or Mentally Infirm?	Income	Child Care Expenses

Universal child care benefit (UCCB) — Is RC62 slip attached?

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 received as part of the Canada Emergency Response Benefit?

\_\_\_\_\_

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 and for whom?

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

## 8. COVID-19

Worked from home due to COVID-19 more than 50% of the time for a period of at least 4 consecutive weeks this tax year and paid for home office expenses?

Yes

No

Are you claiming home expenses using the temporary flat rate method?

Yes

No

If yes, please provide total number of days (maximum of 200 days) you worked from home (do not include days off, sick days, vacation dates, leave of absence, etc.)

\_\_\_\_\_

Are you claiming home expenses using the detailed method?

Yes

No

If yes, are the T2200S, eligible home expenses, and both total and business square footage attached?

Yes

No

Is your work space a common area?

Yes

No

## 9. 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
- Did the taxpayer receive any amounts for a retirement income security benefit under the *Canadian Forces Members and Veterans Re-establishment and Compensation Act*? If so, provide documentation.  Yes  No

## 10. 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 the taxpayer dispose of property or investments during the year, (excluding any residences that were designated as a principal residence at any time)? If so, provide the following details in a separate list:

Description of Property and Quantity	Date Acquired	Date Disposed of	Sales Proceeds	Cost	Expenses for Disposal
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Did the taxpayer dispose of property or investments during the year that were designated as a principal residence at any time? If so, provide the following details in a separate list:

Description of Property and Quantity	Date Acquired	Date Disposed of	Sales Proceeds	Cost	Expenses for Disposal	Adjusted cost base at the time of disposition	If owned prior to 1982, fair market value of property at December 31, 1981	If owned prior to 1982, adjusted cost base of property at December 31, 1981	Which years was this property designated as a principal residence?
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Interest paid to earn investment income \_\_\_\_\_ Management fees \_\_\_\_\_ Accounting/legal fees \_\_\_\_\_

## 11. 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:
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- 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 asset additions and disposals (including cars, equipment, etc.) attached?  Yes  No

## 12. 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 case no CCA should be claimed)?  Yes  No
- Did the taxpayer convert any income producing property to personal or vice-versa? If so, please provide details.  Yes  No

## 13. RRSP/PRPP Contributions

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

## 14. Other Credits

- T2202 — Tuition amount for taxpayer?  Yes  No
- T2202 — Tuition amount claimed on transfer from dependant?  Yes  No
- Receipt or amount for taxpayer's student loan interest?  Yes  No
- Receipts/listing of all medical expenses paid in the year for the taxpayer, spouse, and dependants?  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 expenses for travel in 2020 for Ontario seniors (receipts/details)?  Yes  No
- Receipts for amounts paid for subscription to qualified Canadian journalism organization (QCJO)?  Yes  No
- First-time home buyers' amount?  Yes  No
- Amount of property taxes/rent paid in the year and the name of the landlord/municipality?  Yes  No

## 15. 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 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 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 instalments paid for the year attached?  Yes  No