

# PERSONAL TAX ORGANIZER

For the year 2023

Please complete this T1 Organizer before your appointment. Please attach all applicable slips, receipts, lists, and other supplemental information.

## 1. Personal Information

Name	SIN	Date of Birth (dd/mm/yy)	Office	Phone	Ext.
Taxpayer					
Spouse or Common-Law Partner					
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

## 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 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. 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

T4FHSA — First home savings account 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

## 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/T5013(A) — Partnership income? Yes  No
- T5008 — Income from securities transactions? Yes  No
- Sold any crypto-assets? 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
--------------------------------------	---------------	------------------	----------------	------	-----------------------

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?
--------------------------------------	---------------	------------------	----------------	------	-----------------------	-----------------------------------------------	----------------------------------------------------------------------------	-----------------------------------------------------------------------------	--------------------------------------------------------------------

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? 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:

\_\_\_\_\_

- 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

## 11. 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

## 12. RRSP/PRPP/FHSA 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

## 13. 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 for Ontario seniors (receipts/details)?  Yes  No

Receipts/listing for fitness and arts activity amounts paid for each child? (applicable for taxpayers living in Manitoba, Quebec, and Yukon)  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

## 14. 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 or direct deposit form attached?  Yes  No

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

## 15. COVID-19 Information

Payment summaries for repayment of COVID-19 benefits

Yes

No

Did you receive a Canadian Emergency Business Account (“CEBA”) loan? How much? How much has been repaid and when was it repaid?

---