

# TAXplan

## tax planning & preparation

### PERSONAL TAX 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-law      Separated      Divorced      Widowed

If married or common-law, should your tax return be filed jointly with your spouse's return?      Yes      No

#### 2. Elections Canada

Is the taxpayer a Canadian Citizen?      Yes      No

Is the taxpayer's spouse a Canadian Citizen?      Yes      No

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

#### 3. Foreign Reporting

Did the taxpayer own or hold foreign property with a total cost of more than \$100,000CAN at any time during the year?      Yes      No

#### 4. Change in Personal or Financial Situation During the Year

Did the taxpayer's marital status change during the year?      Yes      No  
If yes, provide date: \_\_\_\_\_

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 \_\_\_\_\_

Did the taxpayer become deceased during the year?  
If yes, provide:  
date of death \_\_\_\_\_

or date of departure \_\_\_\_\_

Did the taxpayer declare bankruptcy during the year? Yes No

Did the taxpayer close a bank account or investment account? Yes No

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 attached? Yes No

Did the taxpayer receive Employment Insurance? Yes No

If yes, is the T4E slip attached? Yes No

Did the taxpayer receive taxable benefits not shown on the T4 slip? Yes No

If yes, provide details: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Did the taxpayer receive any employment income in the form of commission? Yes No

Did the taxpayer receive a GST rebate? Yes No

If yes, amount received: \_\_\_\_\_

Did the taxpayer pay union/professional 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 income? Yes No

If yes, are the appropriate T slips attached? Yes No

Old Age Security T4 (OAS) CPP/QPP T4A (P) Pension T4A RRSP/RPP/RRIF T4RSP/T4RRIF

## 8. Investment Income/Deductions

Did the taxpayer earn investment income? Yes No

If yes, are the appropriate T slips attached? Yes No

Interest (T5/T600) Dividends Estate/Trust (T3) Partnership/Tax Shelters (T101/T5013)

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

Description of Property	Date Acquired	Date Disposed	Sale Proceeds	Cost	Expenses for Disposal

Interest paid to earn  
Investment income \_\_\_\_\_

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

Accounting/  
legal fees \_\_\_\_\_

## 9. Self-Employment/ Business Income

Was the taxpayer self-employed during the year? Yes No

If yes, is (are) the appropriate self-employment statement(s) attached? Yes No

If an owner/manager, did the taxpayer have a shareholder loan outstanding during the year? Yes No

If yes, provides details of borrowings and repayment: \_\_\_\_\_

## 10. Rental Income

Did the taxpayer have rental income? Yes No

If yes, is a statement of rental income attached? Yes No

## 11. RRSP Contributions

Did the taxpayer make an RRSP contribution during the year? Yes No

If yes, is the T slip and other documentation attached? Yes No

Nature of RRSP contribution: Contribution to Personal RRSP Contribution to Spousal RRSP

## 12. Other Items

Tuition/Education amount for self? Yes No

If yes, is the appropriate T slip attached? Yes No

Tuition/Education amount claimed on transfer from dependant? Yes No

If yes, is the appropriate T slip attached? Yes No

Did the taxpayer pay interest on a student loan? Yes No

Are appropriate details disclosed in an attached schedule? Yes No

Are childcare expenses claimed? Yes No

If yes, is the appropriate documentation attached? Yes No

Are medical expenses claimed? Yes No

If yes, is the appropriate documentation attached? Yes No

Are charitable donations claimed? Yes 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

Is Public Transit amount being claimed? Yes No

Was tax paid by installments? 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 Notice 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