

PERSONAL TAX ORGANIZER
For the year 2020



Please complete this T1 Organizer before submitting your documents.
 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					
Address				Home	
				Mobile	
Email:					

Marital Status: Married Single Common-law Separated Divorced Widowed

If married or common-law, and we are not preparing their return, please provide their net income: _____

If marital status changed during the year, provide date of change (dd/mm/yy): _____

2. Residence

Province or territory of residence on December 31: _____

Have you sold your home in 2019? Yes No

If yes, provide a copy of the Statement of Adjustments from the closing documents and the year you purchased your home.

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 between CAN\$100,000 and CAN\$250,000 at any time during the year? Yes No

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

If yes, please provide us with a list and all relevant details.

5. Dependants

Name	Relationship	Date of Birth	SIN	Physically or Mentally Infirm?	Income	Child Care Expenses

6. 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? _____
- Provide us with the amount paid for union and professional dues as well as the names of the organizations? _____
- List of child care expenses, with receipts, for each child? Yes No
- List of moving expenses paid? 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

7. Pension Income

- T4A – Pension, retirement and annuity income? Yes No
- T4A (P) – 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

8. Investment Income/Deductions

- T3 – Income from trust allocations? Yes No
- T5 – Investment income? Yes No
- T4PS – Income from profit sharing plans? Yes No
- T5013 – Partnership income? Yes No
- T5008 – Income from securities transactions? Yes No

Did the taxpayer dispose of property or investments during the year? If so, provide the following details in a separate list:

Description of Property & Quantity	Date Acquired	Date Disposed of	Sales Proceeds	Cost	Expenses for Disposal

Interest paid to earn investment income _____ Management fees _____ Accounting/legal fees _____

9. Self-Employment/Business Income

- Listing of receipts for expenses & invoice for sales 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

10. 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

11. RRSP/pool registered pension plan (PRPP) Contributions

- Receipts for contributions made attached? Yes No
- Where any amounts repaid during the year to a home buyers' plan or a lifelong learning plan? Yes No

12. Other Credits

- | | | |
|---|------------------------------|-----------------------------|
| T2202 – Tuition/education amount for taxpayer? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| T2202 – Tuition/education amount claimed on transfer from dependant? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Receipt or amount for taxpayer's student loan interest? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Receipts/listing of all medical expenses paid in the year for taxpayer, spouse, and dependants? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Printout from benefit providers showing claims made and amounts paid for each family member covering all of 2019? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Receipts for political contributions? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| List of eligible teaching supplies purchased (for teachers and early childhood educators only)? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Information pertaining to the purchase of a new home to claim the first-time home buyer's amount? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Amount of property taxes paid in the year and name of municipality? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Receipts for rent paid & name of landlord? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

13. Prior Year Tax Return Information/Correspondence

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|--|------------------------------|-----------------------------|
| Is a copy of the Notice of Assessment for last year's tax return attached? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| If new to the firm, are tax returns (and corresponding Notices of Assessment) for the last three years attached? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| If taxpayer claimed a loss carryback in any of the preceding 3 years, are the Notices of Reassessment for those years attached? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Is a copy of any other correspondence from the Canada Revenue Agency attached? | <input type="checkbox"/> Yes | <input type="checkbox"/> 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? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Is your statement of instalments paid for the year attached? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |