

PERSONAL TAX ORGANIZER

Please complete this T1 Organizer before bringing in your tax paper. Please attach all applicable slips, receipts, lists, and other supplemental information.

1. PERSONAL INFORMATION

			Date Of Birth	Phone		
Name		SIN	(dd/mm/yy)	Office Ext		Ext
Taxpayer						
Spouse						
Address				Home		
Email				Mobile		
Marital Status: Married Single Common-law Separated Divorced Widowed						

If marital status changes 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 o	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?

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.

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 Oyes any time during the year? If yes, please provide the total foreign income and capital gains earned during the	no
any time during the year? If yes, please provide the total foreign income and capital gains earned during the C	
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? If yes, please provide a detailed list of all income and capital gains earned during the year.

5. DEPENDANTS

Name	Relationship	Date of Birth	SIN	Physically or Mentally Infirmed?	Income	Child Care Expenses (provide rece

6. GENERAL INCOME/DEDUCTIONS

T4 slips - Employment income?

T4A - Commission and self-employment?

- T4E Employment insurance?
- T5007 Social assistance?

List of child care expenses, with receipts, for each child? List of moving expenses paid and for whom?

List of spousal support payments made or received?

Is a signed Form T2200 attached?

7. PENSION INCOME

T4A - Pension, retirement and annuity income?

- T4A (P) Canada pension plan benefits?
- T4A (OAS) Old age security pension slip/foreign pensions?
- T4A-RCA Retirement compensation arrangements?
- T4RSP Registered retirement savings plan income?
- T4RIF Registered Retirement income fund income?

Does the taxpayer elect to split eligible pension income with his/her spouse or common-law partner?

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 the required documentation.

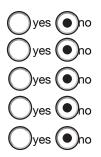
Oyes Ono
Oyes 💽 no
Oyes 💽 no
Oyes Ono
⊖ yes ●no
() yes (● no
🔵 yes 💽 no
yes ()no

yes

no

8. INVESTMENT INCOME/DEDUCTIONS

- T3 Income from trust allocations?
- T5 Investment income?
- T4PS Income from profit sharing plans?
- T5013 Partnership income?
- T5008 Income from securities transactions?



Did the taxpayer dispose of property or investments during the year (excluding any residences that were designated as a principal residence at any time in 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

Did the taxpayer dispose of any property or investments during the year that were designated as a principal residence at any time in the year? If so, provide the following details in a separate list:

Date Acquired		
Date Disposed of		
Sales Proceeds		
Cost		
Expenses for Disposal		
Which years was this property designated as a principal residence?		

Interest paid to earn	
Investment income	

Management Fees

9. SELF-EMPLOYMENT/BUSINESS INCOME

Forms can be found on our website: https://www.tcjones.ca/services/

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 the taxpayer used a portion of his/her home for business, are the home expenses and both total and business square footage attached?	Oyes Ono
Is a list of all asset additions and disposals (including cars, equipment, etc.) attached?	🔘 yes 💽 no
Have you rented your home or another property you own on air b&b?	
10. RENTAL INCOME	
Forms can be found on our website: https://www.tcjones.ca/services/	
If the taxpayer owned rental property, is a statement of rental income attached?	
Does the taxpayer also live in the rental property (in which case no CCA should be claimed)?	yes 💽 no

Where any amounts repaid during the year to a home buyers' plan or a lifelong learning plan?

11. RRSP/POOL REGISTERED PENSION PLAN (PRPP) CONTRIBUTIONS

T-slip for contributions made attached?	
Where any amounts repaid during the year to a home buyers' plan or a lifelong learning plan?	yes Ono

12. OTHER CREDITS

T2202A – Tuition amount for taxpayer?	Oyes Ono
T2202A – Tuition amount claimed on transfer from dependant?	Oyes Ono
Receipt or amount for taxpayer's student loan interest?	Oyes Ono
Receipts/listing of all medical expenses paid in the year for taxpayer, spouse, and dependants?	Oyes Ono
Receipts for charitable donations or donations made by way of gifting an item in kind?	yes no
Receipts for political contributions?	
List of eligible teaching supplies purchased (for teachers and early childhood educators only)?	yes no
Information pertaining to the purchase of a new home to claim the first-time home buyer's amount?	yes Ino

13. PRIOR YEAR TAX RETURN INFORMATION/CORRESPONDENCE

Is a copy of the Notice of Assessment for last year's tax return attached?	Oyes Ono
If new to the firm, are tax returns (and corresponding Notices of Assessment) for the last three years attached?	
If taxpayer claimed a loss carryback in any of the preceding 3 years, are the Notices of Reassessment for those years attached?	Oyes Ono
Is a copy of any other correspondence from the CRA 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 Ono
Is your statement of instalments paid for the year attached?	