

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

	Name	SIN	Date Of Birth (dd/mm/yy)	Phone	
				Office	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 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 between CAN\$100,000 and CAN\$250,000 at any time during the year? If yes, please provide the 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 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. yes no

5. DEPENDANTS

Name	Relationship	Date of Birth	SIN	Physically or Mentally Infirm?	Income	Child Care Expenses (provide receipt)

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
- List of child care expenses, with receipts, for each child? List of moving expenses paid and for whom? yes no
- List of spousal support payments made or received? 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
- 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. 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 (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? yes no
- 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? yes no

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? 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

- T-slip 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

- T2202A – Tuition amount for taxpayer? yes no
- T2202A – 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 taxpayer, spouse, and dependants? yes no
- Receipts for charitable donations or donations made by way of gifting an item in kind? yes no
- Receipts for political contributions? yes no
- 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 no

13. 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 3 years, are the Notices of Reassessment for those years attached?

yes no

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 no

Is your statement of instalments paid for the year attached?

yes no