

# 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)	Phone	
			Office	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): \_\_\_\_\_

Was the taxpayer born in the U.S. or is he/she a U.S. citizen?  Yes  No

### 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. 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 Handicapped?	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? \_\_\_\_\_
- 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 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
- 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
- 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 the required 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 – 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 in the year)? 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 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:

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 as of December 31, 1981			
If owned prior to 1982, adjusted cost base of property as of 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/a 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:

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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 change a rental property to a personal-use property or vice-versa?  Yes  No

If so, please provide details.

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## 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 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, Québec, and Yukon)?  Yes  No
- Information pertaining to the purchase of a new home to claim the first time home buyer's amount?  Yes  No
- Amount of property taxes/rent paid in the year and name of landlord/municipality?  Yes  No
- If yes, please enter the name of landlord or municipality to whom payment was made:  
\_\_\_\_\_

### 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 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 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?  
If so, how much has been repaid and when was it repaid? \_\_\_\_\_