

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, would you like your tax return to be filed jointly with your spouse's return? Yes _____
 No _____

2. Elections Canada

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 \$100,000 CAN 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 _____

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? Yes _____ No _____

If yes, provided:

date of death _____

Did the taxpayer declare bankruptcy during the year? Yes _____ No _____

Did the taxpayer refinance a business with new or revised debt? 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 ___

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

Did the taxpayer receive a GST rebate?

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 ___

Is the taxpayer a tradesperson who is eligible to claim the cost of new tools? 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?

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

8. Investment Income/Deduction

Did the taxpayer earn investment income? Yes ___ No ___

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

___ Interest (T5/T600) ___ Dividends (T5) ___ 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, provide details of borrowings and repayments: _____

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/Text Book amount for self? Yes ___ No ___

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

Tuition/Education/Text Book 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 ___

Did the taxpayer have a transit pass valid for a month or longer? Yes ___ No ___

If yes, please provide details. Yes ___ No ___

Are child care expenses claimed?	Yes___	No___
If yes, is the appropriate documentation attached?	Yes___	No___
Has the taxpayer's family received the \$100 per month for each child under the age of 6? (Universal Child Care Benefit)	Yes___	No___
If yes, is the RC62 slip 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___
Was tax paid by instalments?		
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 Notices of Assessment) attached?	Yes___	No___
Other than the Notice of Assessment for the your tax return, did you receive any other correspondence from Canada Revenue Agency?	Yes___	No___
Is a copy of this correspondence attached?	Yes___	No___

Please print this document with your responses and fax to Granatstein Lusthouse Mar LLP at 416.499.9299 or mail in advance of your visit to our office.

If you have questions or need help, please contact our office at 416.499.9099