

PERSONAL TAX ORGANIZER

New Client Checklist

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					
Address				Home	
				Mobile	
Email:					

Marital Status: Married Single Common-law Separated Divorced Widowed

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

Was the taxpayer born in the US or is he/she a US citizen or a US card holder? 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, capital gains, cost of the property and/or fair market value. Yes No

If yes, please provide details.

5. Change in Personal or Financial Situation During the Year

Date the taxpayer declared bankruptcy during the year: _____

6. Dependants

Name	Relationship	Date of Birth	SIN	Physically or Mentally Infirm?	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? Tips? _____

Provide us with the amount paid for union and professional dues as well as the names of the organizations? If not on your T4. _____

List of child care expenses, with receipts, for each child? Yes No

Did you move in a year? Yes No

If yes, provide details. _____

List of spousal and child support payments made or received? Yes No

List of deductible employment expenses? Yes No

If yes, please attach signed T2200 form. Yes No

Did you work from home in 2021 due to Covid-19? If yes, how many days? 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

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

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

Did the taxpayer dispose of property 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 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:

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

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 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
- If yes, provide details.

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. (i.e. Date, Fair Market Value of Property)

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

- T-slip for contributions made attached? If yes, provide slips from 2021 and first 60 days of 2022. 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
- 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
- Did taxpayer have eligible home renovation expenses? (SK residents only) Yes No
- Receipts for recreational & sports activities for children under 18 years? Yes No

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 year 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 installments paid for the year attached? Yes No

