

20 PERSONAL TAX ORGANIZER

Please complete this T1 Organizer before your appointment and attach all applicable slips and documents

Personal information					
Name		SIN	Date of Birth	Phone number	
Taxpayer				Work	
Spouse				Work	
Address				Home	
				Cell	
Dependents					
Relationship	Name	SIN	Date of Birth		

INCOME	
	T4 slips - Employment income
	T4A – Commission and self-employment
	T4E - Unemployment Insurance benefits
	T5007 – Social assistance
	T5013/T5013(A) – Partnership income
	T3, T5 or T600 – Interest and other investment income
	T4A – Pension, retirement and annuity income
	T4AP – Canada pension plan benefits
	T4 (P) - CPP/QPP Benefits
	T4A (OAS) - Old Age Security
	T4A (RCA) – Retirement compensation arrangements
	T4RSP – Registered retirement savings plan income
	T4RIF – Registered retirement income fund income
	If the taxpayer owned rental property, is a statement of rental income attached?
	Are there any capital gains/losses
	Did the taxpayer dispose of any capital properties during the year? (Attach copies of sales detail and original purchase documentation)
	Other income (e.g. stock options, alimony, pensions, annuities, research grants and bursaries, lump-sum pension receipts, RRSPs - attach T4RSP, Global income)

DEDUCTIONS	
	Registered retirement savings plan contributions (attach receipts)
	Amount paid for union and professional dues (attach receipts)
	Child care expenses (attach receipts)
	Tuition Fees (attach T2202/T2202A paid by you or your dependent child)
	Receipt or amount paid for taxpayer's student loan interest
	Moving expenses (attach receipts) and indicate distance moved for new employment (minimum of 40km)
	Summer camps (please indicate number of weeks that were in-residence)
	Attendant care expenses (attach receipts)
	Alimony or Separation allowance paid (include the name and address of recipient and earliest date of separation)
	Public transit passes (attach original passes or receipts)
	Employment related expenses (detail and form T2200 or T12)
	Carrying charges, interest expenses, interest charges and accounting fees
	Other deductions and expenses (attach receipts)
	Charitable Donations (attach receipts)
	Medical expenses (attach receipts)
	Children's Activities (attach receipts)
	Vehicle used for business (attach vehicle expenses and both total and business mileage)
	Political contributions (attach receipts)
	Tools bought by tradesperson (attach receipts)
	Interest on money borrowed to purchase an investment
	Statement of income tax installments paid to the date for current year
	Rent/Property Taxes paid (attach receipts)
	Used a portion of home for business (attach home expenses and both total & business area sq. ft.)

I will be pleased to welcome new clients. Let me know if you would like me to send this Tax Organizer to your family, friend or colleague. Please connect with me on...

