

PERSONAL TAX ORGANIZER for the year 2020

Please complete this T1 Organizer and submit it along with your applicable slips, receipts, lists and other supplemental information

1. Basic Personal Information

<i>Name</i>		<i>SIN</i>	<i>Date of Birth (dd/mm/yy)</i>	<i>Phone</i>
Taxpayer				Office
Spouse				Office
Address				Home
Email				Mobile

- * Marital Status (circle one): 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): Yes / No
- * Were you born in the US or are you a US citizen? Yes / No
- * Are you a Canadian citizen? Yes / No
- * If yes, do you authorize the CRA to provide your name, address and date of birth to Elections Canada to update their information on the National Register of Electors Yes / No
- * Do you 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
- * Do you 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
- * Did you sell your principle residence in 2020? Yes / No

Quick checklist

Do you have regular income? / Deductions?	if YES , fill in part	1
Do you have pension income?	if YES , fill in part	2
Do you have additional credits? (RRSP contributions, tuition paid, etc.)	if YES , fill in part	3/4
Do you have investment income or deductions?	if YES , fill in part	5
Do you have self-employment income or deductions?	if YES , fill in part	6
Do you have rental income or deductions?	if YES , fill in part	7
Do you have dependents?	if YES , fill in part	8
Are you a new client for me?	if YES , fill in part	9
Have you moved in the year?	if YES , fill in part	10

1. 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? (like tips)	_____
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 receipt, for each child?	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

2. 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
Do you elect to split eligible pension income with your spouse or common-law partner?	Yes / No
Did you receive any amounts for a retirement income security benefit under the <i>Canadian Forces Members and Veterans Re-establishment and Compensation Act</i> ? If so, provide the required documentation	Yes / No

3. RRSP / pool registered pension plan (PRPP) 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

4. Other Credits

- T2202 - Tuition amount for you? Yes / No
- T2202 - Tuition amount claimed on transfer from dependant? Yes / No
- Receipt or amount from your student loan interest? Yes / No
- Receipts / listing of all medical expenses paid in the year for you, your 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
- Information pertaining to the purchase of a new home to claim the first-time home buyer's amount? Yes / No

5. 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 you 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:

<i>Description of Property & Quantity</i>	<i>Date Acquired</i>	<i>Date Disposed of</i>	<i>Sales Proceeds</i>	<i>Cost</i>	<i>Expenses for Disposal</i>

- Interest paid to earn investment income _____
- Management fees paid on investment portfolios _____
- Accounting/ legal fees paid to prepare last year's personal return _____

6. 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 you were a shareholder of a private corporation, did the taxpayer have a shareholder loan outstanding during the year? 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

7. 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

8. Dependents

<i>Name</i>	<i>Relationship</i>	<i>Date of Birth</i>	<i>SIN</i>	<i>Physically or Mentally Infirm?</i>	<i>Income</i>	<i>Child care expenses</i>

- If you are a single parent, is the UCCB designated to a dependent? Yes / No

9. Prior Year Tax Return Information / Correspondence

- Please attach your prior year tax return Yes / No
- Is a copy of any other correspondence from the CRA attached? Yes / No

10. 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 _____

Did you move in the current year to be closer to your job? Yes / No

Did you dispose of any property or investments during the year that were designated as a principal residents at anytime in the last three years? 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			
Adjusted cost base a the time of disposition			
If owned prior to 1982, fair market value of property as at December 31, 1981			
If owned prior to 1982, adjusted cost base of property as at December 31, 1981			
Which years was this property designated as a principal residence?			