

# CAL ACCOUNTING & Management Services

For the Tax Year:

Please complete this T1 Organizer and submit it with all pertinent tax data.

## PERSONAL INFORMATION:

<b>Taxpayer Name</b> _____	<b>SIN #</b> _____	<b>Date of Birth</b> _____	<b>Phone #</b> _____
----------------------------	--------------------	----------------------------	----------------------

<b>Spouse:</b> _____	_____	_____	_____
----------------------	-------	-------	-------

**Address:** Street & # \_\_\_\_\_  
 RR#/POB# \_\_\_\_\_  
 Town/City \_\_\_\_\_  
 Province \_\_\_\_\_  
 Postal Code \_\_\_\_\_

**Email:** \_\_\_\_\_

<b>Marital Status:</b>	Married	Single	Common law
	Separated	Divorced	Widowed

Did you receive or make support payments during the year? If eligible, do you wish to split pension income?	Yes	No
	Yes	No

## CRA QUESTIONS:

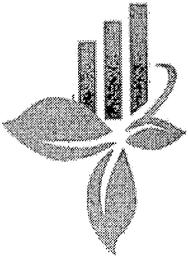
Are you a Canadian Citizen?	Yes	No
The taxpayer authorizes the CRA to provide his/her name, address, and date of birth to Elections Canada to update his/her information on the National Register of Electors.	Yes	No
Do you have income that is exempt under the Indian Act?	Yes	No
Do you authorize the CRA to provide your name and email address to Ontario Health to contact you regarding organ and tissue donation?	Yes	No

## FOREIGN REPORTING:

Did the taxpayer own or hold foreign property with a total cost of more than \$100,000.CDN at any time during the year?	Yes	No
---	-----	----

## CHANGE IN PERSONAL OR FINANCIAL SITUATION DURING THE YEAR:

Did the taxpayer's marital status change during the year?	Yes	No
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



# CAL ACCOUNTING

& Management Services

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, provide date of death \_\_\_\_\_  
please attach death certificate

DEPENDANTS:	Relationship	Name	SIN #	Date of Birth	Income
1.	_____	_____	_____	_____	_____
2.	_____	_____	_____	_____	_____
3.	_____	_____	_____	_____	_____

## EMPLOYMENT INCOME / DEDUCTIONS:

Did the taxpayer earn income from employment? Yes No  
If yes, please attach all T4 slips

Did the taxpayer receive Employment Insurance? Yes No  
If yes, please attach all T4E slips

Did the taxpayer receive taxable benefits not shown on the T4 slip? Yes No

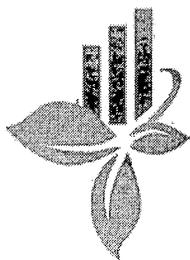
Did the taxpayer receive any employment income in the form of commission? Yes No

Did the taxpayer receive a G/HST rebate? Yes No  
If yes, amount received: \_\_\_\_\_

Did the taxpayer pay union / professional dues? Yes No  
If yes, attach all paid receipts:

Did the taxpayer participate in an employee profit-sharing plan? Yes No  
If yes, please attach all T4PS slips

Is the taxpayer claiming deductible employment expenses? Yes No  
If yes, please attach a signed T2200 from the employer



# CAL ACCOUNTING

## & Management Services

Did the taxpayer receive pension income? Yes  No   
 If yes, please attach the following T slips if applicable  
T4A(OAS)      T4A(P)      T4A  
T4RSP      T4RIF      Foreign Pensions  
 If Foreign Pensions received, attach details by country and currency

Did the taxpayer earn investment income? Yes  No   
 If yes, please attach the following T slips if applicable  
T5 (dividends)    T5 (interest)    T3 (trust/estate)  
T5008 (share transactions)    T5013

Did the taxpayer dispose of property during the year? Yes  No   
 If yes, please complete schedule

Date Acquired	Date Disposed	Description of Property	Sale Proceeds	Cost	Disposal Expenses
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

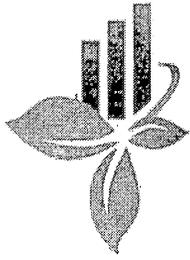
Please provide documents to support the schedule  
 disposal expenses include real estate commission and legal fees  
 if there was any interest paid to earn investment income please provide support

### SELF-EMPLOYMENT / BUSINESS INCOME:

Was the taxpayer self-employed during the year? Yes  No   
 If yes, is the appropriate self-employment statement attached?  
 Please see Business Income checklist for details

### RENTAL INCOME:

Did the taxpayer have rental income? Yes  No   
 If yes, is the appropriate rental income statement attached?  
 Please see Rental income checklist for details



# CAL ACCOUNTING

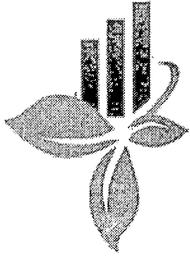
## & Management Services

### RRSP CONTRIBUTIONS:

- Did the taxpayer make an RRSP contribution during the year? Yes No  
If yes, please attach all RRSP slips
- Did the taxpayer have an HBP (Home Buyer Plan) Yes No  
If yes, please provide CRA statement for HBP repayment (Notice of Assessment)
- Did the taxpayer have an LLP (Lifelong Learning Plan) Yes No  
If yes, please provide CRA statement for LLP repayment (Notice of Assessment)

### OTHER ITEMS:

- Tuition / Education for self? Yes No  
If yes, please attach T2202A
- Tuition / Education amount claimed on transfer from dependant? Yes No  
If yes, please attach T2202A signed by dependant to you
- Did the taxpayer pay interest on a student loan? Yes No  
If yes, please attach statement
- Did the taxpayer or spouse incur child care expenses? Yes No  
If yes, please provide paid receipts
- Did the taxpayer incur medical expenses? Yes No  
If yes, please provide paid receipts
- Did the taxpayer make donation / charitable contributions? Yes No  
If yes, please provide paid receipts reflecting CRA recognized charitable organizations
- Did the taxpayer make a political donation? Yes No  
If yes, please provide paid receipts
- Did the taxpayer make property tax or rent payments for personal residence? Yes No  
If yes, please provide paid receipts from municipality or landlord
- Did the taxpayer make personal income tax installments? Yes No  
If yes, please provide paid receipts to CRA or statement from CRA issued mid-February
- Is the taxpayer is new to Cal Accounting & Management Services? Yes No  
If yes, please provide a copy of the prior year tax return and notice of assessment from CRA



**CAL ACCOUNTING**  
**& Management Services**

Did the taxpayer receive a pension from a country other than Canada?    Yes    No  
If yes, provide the following details for each pension received (attach additional pages, if required)

**OTHER NOTES OF THE TAX PAYER:**

**ONCE WE HAVE REVIEWED THE DETAILS SUBMITTED, WE WILL CONTACT YOU TO CONFIRM RECEIPT AND ARRANGE A MEETING, IF THERE ARE MATTERS THAT REQUIRE DISCUSSION PRIOR TO CAL ACCOUNTING & MANAGEMENT PREPARING THE TAX RETURN.**

A Division of 1379802 Ontario Inc.  
**27 Clapperton Street, Suite 301**  
**Barrie, Ontario L4M 3E6**  
**Tel: 705-728-6469**

## 2025 Foreign Property Reporting

Canadian resident individuals who held certain property outside Canada with a total cost of more than \$100,000 CAD at any time during the tax year are subject to certain disclosure requirements to the Canada Revenue Agency (CRA).

Non-compliance with this reporting requirement results in severe penalties. To help us determine whether you are subject to the reporting rule, please read and consider each of the following questions carefully when answering them.

If you owned any of the following property at any time during the year, answer YES to the relevant questions. You may be subject to the foreign property reporting rule, and we may prepare additional forms to submit to the CRA.

1. Funds or intangible property (patents, copyrights, etc.) situated, deposited or held outside Canada.  Yes  No
2. Tangible property situated outside of Canada.  Yes  No
3. A share of the capital stock of a non-resident corporation held by the taxpayer or by an agent on behalf of the taxpayer.  Yes  No
4. An interest in a non-resident trust that was acquired for consideration, other than an interest in a non-resident trust that is a foreign affiliate for the purposes of section 233.4.  Yes  No
5. An interest in a partnership that holds a Specified Foreign Property unless the partnership is required to file a T1135.  Yes  No
6. An interest in, or right with respect to, an entity that is a non-resident.  Yes  No
7. A property that is convertible into, exchangeable for, or confers a right to acquire a property that is Specified Foreign Property.  Yes  No
8. A debt owed by a non-resident, including government and corporate bonds, debentures, mortgages, and notes receivable.  Yes  No
9. An interest in a foreign insurance policy.  Yes  No
10. Precious metals, gold certificates, and futures contracts held outside Canada.  Yes  No

\_\_\_\_\_  
Signature:

\_\_\_\_\_  
Signing date

Please return the completed form to: CAL ACCOUNTING & MANAGEMENT SERVICES, 301 - 27 Clapperton Street, BARRIE, ON L4M 3E6 or paul@calaccounting.ca