

Personal Income Tax Organizer

Please complete this organizer and return it with all pertinent tax data. Only your name, contact details and the tax year are required — answer the remaining questions as they apply to you. Tick each item as you gather it.

For the tax year _____

Personal Information

Taxpayer name	SIN #	Date of birth	Phone #
_____	_____	_____	_____
Spouse name	Spouse SIN #	Spouse date of birth	Spouse phone #
_____	_____	_____	_____
Address — street & number		RR # / PO Box #	
_____		_____	
Town / city	Province	Postal code	Email
_____	_____	_____	_____

Marital status

☐ Married
 ☐ Single
 ☐ Common law
 ☐ Separated
 ☐ Divorced
 ☐ Widowed

Did you receive or make support payments during the year? ☐ Yes ☐ No

If eligible, do you wish to split pension income? ☐ Yes ☐ No

CRA Questions

Are you a Canadian citizen? ☐ Yes ☐ No

Do you authorize the CRA to provide your name, address and date of birth to Elections Canada to update 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 regarding organ and tissue donation? ☐ Yes ☐ No

Foreign Reporting

Did you own or hold foreign property with a total cost of more than \$100,000 CAD at any time during the year? ☐ Yes ☐ No

If yes, please also complete the Foreign Property Reporting section at the end.

Change in Personal or Financial Situation During the Year

Did your marital status change during the year? ☐ Yes ☐ No

Did you declare bankruptcy during the year? ☐ Yes ☐ No

Did you refinance a business with new or revised debt? ☐ Yes ☐ No

Did you close a bank account or investment account? ☐ Yes ☐ No

Did you immigrate to, or emigrate from, Canada during the year?

☐ Yes ☐ No

If yes — date of entry into Canada, or date of departure

Did the taxpayer become deceased during the year?

☐ Yes ☐ No

If yes — date of death (please attach the death certificate)

Dependants

Relationship	Name	SIN #	Date of birth	Income

Employment Income / Deductions

Did you earn income from employment?

If yes, please attach all T4 slips.

☐ Yes ☐ No

Did you receive Employment Insurance?

If yes, please attach all T4E slips.

☐ Yes ☐ No

Did you receive taxable benefits not shown on the T4 slip?

☐ Yes ☐ No

Did you receive any employment income in the form of commission?

☐ Yes ☐ No

Did you receive a G/HST rebate?

☐ Yes ☐ No

If yes — amount received

Did you pay union or professional dues?

If yes, please attach all paid receipts.

☐ Yes ☐ No

Did you participate in an employee profit-sharing plan?

If yes, please attach all T4PS slips.

☐ Yes ☐ No

Are you claiming deductible employment expenses?

If yes, please attach a signed T2200 from your employer.

☐ Yes ☐ No

Did you receive pension income?

If yes, attach the applicable slips: T4A(OAS), T4A(P), T4A, T4RSP, T4RIF.

☐ Yes ☐ No

Did you earn investment income?

If yes, attach the applicable slips: T5, T3, T5008, T5013 and any investment statements.

☐ Yes ☐ No

Disposition of Property

Did you dispose of property during the year?

If yes, please complete the schedule below.

☐ Yes ☐ No

Date acquired	Date disposed	Description of property	Proceeds	Cost	Expenses

Please provide documents to support the schedule. Disposal expenses include real estate commission and legal fees. If interest was paid to earn investment income, please provide those details as well.

Self-Employment, Rental and RRSP

Were you self-employed during the year?

If yes, please attach the completed Self-Employed Tax Organizer.

☐ Yes ☐ No

Did you have rental income?

If yes, please attach the completed Rental Income Tax Organizer.

☐ Yes ☐ No

Did you make an RRSP contribution during the year?

If yes, please attach all RRSP slips.

☐ Yes ☐ No

Did you have a Home Buyers' Plan (HBP)?

If yes, please provide the CRA statement for HBP repayment (Notice of Assessment).

☐ Yes ☐ No

Did you have a Lifelong Learning Plan (LLP)?

If yes, please provide the CRA statement for LLP repayment (Notice of Assessment).

☐ Yes ☐ No

Other Items

Tuition / education for yourself?

If yes, please attach form T2202A.

☐ Yes ☐ No

Tuition / education amount transferred from a dependant?

If yes, attach the T2202A signed by the dependant transferring the amount to you.

☐ Yes ☐ No

Did you pay interest on a student loan?

If yes, please attach the statement.

☐ Yes ☐ No

Did you or your spouse incur child care expenses?

If yes, please provide paid receipts.

☐ Yes ☐ No

Did you incur medical expenses?

If yes, please provide paid receipts.

☐ Yes ☐ No

Did you make charitable donations?

If yes, please provide paid receipts from CRA-recognized charities.

☐ Yes ☐ No

Did you make a political donation?

If yes, please provide paid receipts.

☐ Yes ☐ No

Did you make property tax or rent payments for a personal residence?

If yes, please provide paid receipts from the municipality or landlord.

☐ Yes ☐ No

Did you make personal income tax installments?

If yes, please provide paid receipts or the statement of account from the CRA.

☐ Yes ☐ No

Are you new to CAL Accounting & Management Services?

If yes, please provide a copy of your prior year tax return and Notice of Assessment.

☐ Yes ☐ No

Did you receive a pension from a country other than Canada?

If yes, please provide details for each pension received; attach additional pages if needed.

☐ Yes ☐ No

Other Notes

Please specify any areas of concern specific to your situation which require attention.

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 must report that property to the CRA on form T1135. Please indicate whether you held any of the following during the year.

- | | |
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| 1. Funds or intangible property (patents, copyrights, etc.) situated, deposited or held outside Canada. | ☐ Yes ☐ No |
| 2. Tangible property situated outside Canada. | ☐ Yes ☐ No |
| 3. A share of the capital stock of a non-resident corporation held by you or by an agent on your behalf. | ☐ Yes ☐ No |
| 4. An interest in a non-resident trust 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. Property convertible into, exchangeable for, or conferring 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 |

Getting Your Information to Us

Please return this organizer together with your slips and receipts. You can bring it to the office at 27 Clapperton Street, Suite 301, call us on 705-728-6469, or send it securely by eCourier from the Contact page at www.calaccounting.ca. Sensitive documents — including anything showing your SIN — should be sent by eCourier or delivered in person rather than by ordinary email.

Personal income tax returns are due 30 April. Returns for self-employed individuals and their spouses are due 15 June, although any balance owing is still due 30 April. Interest and penalties apply to tax liabilities not addressed within these time frames.

Signature

Date