PERSONAL	TAX	ORGA	NIZER
For the vear			

Please complete this T1 Organizer before your appointment. Please attach all applicable slips, lists, and other supplemental information.

Personal Information

	Name			SIN	Date of Birth (dd/mm/yy)	Office	Phone	Ext.
_	Ivaille			Silv	(uu/mm/yy)	Office		EXI.
Taxpayer								
Spouse								
Address						Home Mobile		
E-mail:						IVIODIIC		
Marital State	Status: Married Single Common-law Separated				Divord	ed	Widowed	
If married o	r common-law, should yo	ur return be filed	I jointly with	your spouse's	s return?	Yes		No
If your marit	al status changed during	the year, provid	e date of ch	nange (dd/mm	/yy):			
2. F	Residence							
Province or	territory of residence on	December 31						
Did the taxp	payer immigrate to Canad	la or emigrate fro	om Canada	during the yea	ar?	Yes		No
If yes, provi	de the date of entry into (Canada		or the	e date of departure			
					·			
3. E	lections 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								
To leight Neporting								
Did the taxpayer own or hold foreign property with a total cost of more than CDN\$100,000 at any time during the year? If yes, please provide a list.			Yes		No			
5. Change in Personal or Financial Situation During the Year								
Date the taxpayer declared bankruptcy during the year								
Date the taxpayer refinanced a business with new or revised debt								
Date the taxpayer closed a bank account or investment account								

Name	Relationship	Date of Birth	SIN	Disability Amount	Income	Child Care Expenses

the taxpayer is a single parent, is the UCCB designated to a dependant? Ceneral Income/Deductions 4 slips – Employment income? 4A – Commission and self-employment? 4E – Employment insurance? 55007 – Social assistance? Imployment income or taxable benefits not shown on the T4 slip? Imployment income or taxable benefits not shown on the T4 slip? Imployment income or taxable benefits not shown on the T4 slip? Imployment income or taxable benefits not shown on the T4 slip? Imployment income or taxable benefits not shown on the T4 slip? Imployment income according to the year? Ist of child care expenses, with receipts, for each child? Ist of moving expenses paid in the year? Ist of support payments made or received? Ist of deductible employment expenses? Ist of support payments made or received? Ist of deductible employment expenses? Ist of support payments made or received? Ist of deductible employment expenses? Ist of according to the year? Ist of support payments made or received? Ist of deductible employment expenses? Income Income 4A – Pension Income 4A – Pension Income 4AP – Canada pension plan benefits? 4A(RCA) – Retirement and annuity income? 4A(RCA) – Retirement compensation arrangements? 4A(RCA) – Registered retirement savings plan income? 4A(RCA) – Registered retirement savings plan income? 4A(RCA) – Registered Retirement income fund income? 4A(RCA) – Registered Retirement income fund income? 5. Investment Income/Deductions 3. Income from trust allocations? 5. Investment Income/Deductions 3. Income from trust allocations? 5. Investment income? 4APS – Income from profit sharing plans? 5. Income from profit sharing plans? 5. Income from recurrities transactions? 1. Investment income? 1. Investment income? 1. Investment income? 1. Investment income? 2. Investment income? 3. Income from profit sharing plans? 3. Income from profit sharing plans? 4. Investment income? 4. I	Yes	No
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5008 – Income from securities transactions? Did the taxpayer dispose of property during the year? If so, provide the following details in a separate	Yes	No
Did the taxpayer dispose of property during the year? If so, provide the following details in a separate	Yes	No
	Yes	No
Description of Property Date Acquired Date Disposed Sales Proceeds	ate list:	1
	Cost	Expenses Disposa

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 an owner/manager, did the taxpayer have a shareholder loan outstanding during the year?	Yes	No
If yes, provide details of borrowings and repayments:		
If the taxpayer used a vehicle for business, are the vehicle expenses and both total and business mileage information 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 information attached?	Yes	No
Is a list of all new asset additions attached?	Yes	No
11. Rental Income		
If the taxpayer owned rental property, is a statement of rental income attached?	Yes	No
12. RRSP Contributions		
T-slip for contributions made attached?	Yes	No
13. Other Credits		
T2202 – Tuition/education amount for the taxpayer?	Yes	No
T2202 – Tuition/education amount claimed on transfer from the dependant?	Yes	No
Receipt or amount for the taxpayer's student loan interest?	Yes	No
Receipts/Listing of all medical expenses paid in the year for the taxpayer, spouse, and dependants?	Yes	No
Receipts for donations?	Yes	No
Receipts for charitable donations made by way of gifting an item in kind?	Yes	No
Were any loans associated with the charitable donations?	Yes	No
Receipts for political contributions?	Yes	No
Tickets for public transit?	Yes	No
Receipts/listing for fitness amount paid for each child?	Yes	No
Receipts/listing for activities paid for each child?	Yes	No
Statement for new home to claim the home buyer's amount?	Yes	No
Amount of property taxes/rent paid in the year?	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 three years attached?	Yes	No
If the taxpayer claimed a loss carryback in any of the preceding three years, are the Notices of Reassessment for those years attached?	Yes	No
Is a copy of any other correspondence from the Canada Revenue Agency attached?	Yes	No
If you would like your tax refund deposited directly into your account, is a void cheque attached?	Yes	No
Is your statement of instalments paid for the year attached?	Yes	No