



2018 Personal Tax Organizer

I. PERSONAL AND FAMILY DATA

	Taxpayer	Spouse
Name		
Date of Birth		
Place of Birth		
Country of Citizenship		
Canadian SIN		
US SSN/ITIN		
Occupation		
Home Address		
Home Phone Number		
Cell Phone Number		
Business Address		
Business Phone Number		
Email Addresses		

Dependant Children (indicate if by previous marriage of you or your spouse, or by adoption)

Name	Date of Birth	Canadian SIN	US SSN or ITIN	Income of Child

Other Dependents (if any)

Name	Date of Birth	Canadian SIN	US SSN or ITIN	Income

If your marital status changed in 2018, please provide details: _____

Date of change: _____

Separation Agreement: (please provide a copy of any separation agreement, if applicable)

If we do not prepare your spouse's return, please provide their net income for 2018 (Line 236)

\$ _____

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289-813-4018

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II. REQUIRED INFORMATION

- 1) Do you want Canada Revenue Agency to forward your name, address and date of birth to Elections Canada for updating of the National Register of Electors?
- 2) Do you have direct deposit instructions in place?
- 3) If you have the following items, please indicate and provide them for review:
 - a) Copy of your 2017 Notice of Assessment and copy of your 2017 return (if necessary) [note, this can be obtained directly from the CRA once you have given your Consent (T1013) for our access]
 - b) RRSP contribution limit advice notice if separate from your assessment notice
 - c) Correspondence received from the Canada Revenue Agency during 2018
 - d) GST/HST return for self-employed individuals
 - e) Installment confirmation/reminder received for March 2019 – Total 2018 installments \$ _____
 - f) Details of any stock options exercised during 2018
 - g) 2018 realty tax bill for residence and/or amount of rent paid for residence \$ _____

Principal Residence

_____ Have you sold a personal residence during 2018?

Year of Acquisition: _____ Purchase Price: \$ _____

Date of Sale: _____ Selling Price: \$ _____

Please provide your documentation including the statement of adjustments and the lawyer's trust account for both the sale and purchase of the residence along with details of any improvements made while you owned the residence. This can include both your primary residence and any vacation property you used personally.

Tax on Split Income (TOSI)

For any dividends you have received during 2018, are any of these you received in the year from a corporation you are related to? This relationship can be to corporations owned by a direct family member, such as a grandparent, parent, spouse, child, grandchild, brother, sister, aunt or uncle. - YES

Foreign Property Reporting (in Canada)

You are required to report your foreign property holdings owned during 2018 where the total cost of all such properties in aggregate exceeded \$100,000, additional information will be required to complete this form on your behalf.

_____ YES, reporting is required

Please note that failure to report foreign property holdings on Form T1135 on an annual basis could result in significant penalties being assessed. **Note that most Canadian brokers provide reports to assist with this reporting.** Foreign property holdings include (among other things):

(1) funds in foreign bank accounts (2) shares of foreign corporations (public or private) held in Canadian or foreign brokerage accounts (3) foreign rental property (4) debts owed by non-residents (5) other foreign assets





III. INCOME

Please indicate with an "X" if the following sources of income apply to you for 2018.

Please enclose all tax reporting and other information slips supporting these sources of income.

- Employment and related (T4, W2)
- Old Age Security (T4A(OAS))
- Canada Pension Plan (T4A(P))
- US Social Security (SSA-1099) – please indicate the year you started receiving social security: _____
- RRSP/RRIF Income (T4RSP, T4RIF)
- Other Income and Pensions (T4A, T4A-RCA, 1099-R, 1042-S)
- Universal Child Care Benefit (RC62)
- Employment Insurance (T4E, 1099-G)
- Interest, Dividends and other investment income (T3, T5, T5008, 1042-S, 1099-INT/DIV) etc.
(if joint accounts, please identify and segregate).
- Partnership Income (T5013, 1065 K-1)
- Alimony, Spousal Support, Child Support received – Details: _____
- Capital Gains or Losses -If you disposed of any property during 2018 (such as real estate, stocks, bonds, etc.), please provide us with a description of the property, year of acquisition, cost of acquisition, proceeds of disposition and costs of disposition. Also provide original purchase and sale documentation if available. **Copies of your broker's trade summaries for the year of purchase(s) and sale(s) may also be provided.**
- Rental Income – Please complete our Real Estate Tax Worksheet - [available from our website](#)
- Business or Professional (self-employed) income - Please complete our Business and Professional Tax Worksheet - [available from our website](#)
- Social assistance or Worker's Compensation (T5007)
- Any other sources of income: Please provide details _____





IV. DEDUCTIONS/TAXCREDITS

Please indicate with an "X" if the following deductions/tax credits apply to you for 2018. Please enclose all tax reporting and other information slips supporting these deductions/tax credits.

- RRSP or PRPP Contributions – please provide original contribution receipts for all contributions made during March through December 2018 and the first 60 days of 2019 [even if you do not wish to deduct these amounts in 2018].
- If you are employed in the United States and participate in your employer's 401(k), please provide your annual 401(k) account statement or provide the following breakdown:
Your contributions for 2018: \$ _____ / Your employer's matching contributions: \$ _____
- Union Dues and Professional Association Fees, not included on your T4
- Attendant Care expenses
- Child Care Expenses – If a T4 or receipt is not being provided, please include the name, address and social insurance number of the childcare provider
- Alimony, Spousal Support, Child Support paid – Details: _____
- Carrying charges and other costs related to earning investment income
- Moving Expenses (attach receipts)
- Employment/Commission Expenses – please complete our Employment Expenses Worksheet - [available from our website](#)
- Tuition and Education Amounts – please have Form T2202/T2202A "Tuition, Education and Textbook Amounts Certificate" signed by the student if tuition amount is to be transferred from a child or grandchild. Students attending a university outside of Canada should complete Form TL11A "Tuition, Education and Textbook Amounts Certificate – University Outside Canada". If the education is completed in the United States, please provide a copy of the 1098-T.
- Charitable and Political donations
- Medical Expenses – please complete our Medical Expenses Worksheet - [available from our website](#)
- Disability amounts – please provide a signed form T2201 if you or dependent is claiming disability because of mental or physical impairment.
- Interest on student loans – provide 2018 Interest Summary from financial institution.
- First-time Home Buyers' Tax Credit – did you or your spouse purchase your first home between January 1, 2018 and December 31, 2018? If yes, please provide details
- Residents of the United States – health insurance documents (1095-B or 1095-C)
- Are you a primary or secondary school educator that was required to purchase your own classroom supplies? If so, please provide receipts for purchases not reimbursed by the school board. A written certification from the school's principal (or other delegated official) may be required.
- Other expenses – Details: _____ \$ _____
- Other federal and provincial tax credits – Details: _____ \$ _____

