

Personal Tax Organizer - 2016

<b>Name</b>	
<b>Social Insurance Number</b>	
<b>Date of Birth</b>	
<b>Marital Status</b>	
<b>Address</b>	
<b>Home phone number</b>	
<b>Email Address</b>	
<b>Spouse/Common-law Partner</b>	
<b>Social Insurance Number</b>	
<b>Date of Birth</b>	

Dependent's Name	Relationship	Date of Birth	Net Income
<b>Income split with spouse?</b>			Yes__ No__

<b>Other Information</b>	
<b>Are you a Canadian Citizen?</b>	Yes__ No__
<b>If you are a Canadian citizen, do you authorize the CRA to give your name, address, date of birth, and citizenship to elections Canada for National Register of Electors?</b>	Yes__ No__
<b>Are you a U.S. citizen or green card holder?</b>	Yes__ No__
<b>Are/were either of your parents born in the United States?</b>	Yes__ No__
<b>Have you spent a significant amount of time in the U.S during the last year?</b>	Yes__ No__
<b>Did you own foreign property at any time in 2015 with a total cost of more than \$100,000 CAD?</b>	Yes__ No__
<b>How would you like your tax return printed :</b>	Hard copy__ or PDF Copy__
<b>Please provide copy of 2014 CRA Notice of Assessment</b>	Provided__
<b>Please provide void cheque for CRA direct deposit</b>	Provided__

	Spouse 1		Spouse 2	
	YES	NO	YES	NO
<b>INCOME RECEIVED</b>				
<b>Employment or commission</b> (T4 or T4PS slips and other details e.g. tips)				
<b>Payments from an estate or trust</b> (T3 slips)				
<b>Old Age Security benefits</b> [T4A(OSA)]				
<b>Canada Pension Plan benefits</b> [T4A(P)]				
<b>Pension Income (RRSP, RRIF, etc.)</b> (T4RSP/T4RIF/T4A Slips)				
<b>Employment insurance benefits</b> (T4E slips)				
<b>Capital dividend or interest</b> (T5 slips)				

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<b>Universal Child Care benefits</b> (RC62 slip)				
<b>Income from sources outside Canada</b> (Slips or details where no slips available)				
<b>Rental/Business/Professional/Farming income</b> (Details of income and expenses)				
<b>Capital gains or losses (Real Estate, Stock etc.)</b> (Details of all transactions)				

	<b>Spouse 1</b>		<b>Spouse 2</b>	
<b>TAX DEDUCTIONS - FOR THIS TAXATION YEAR</b>	YES	NO	YES	NO
<b>RRSP contributions</b>				
<b>Pay interest on student loan</b>				
<b>Pay union or professional dues</b>				
<b>Fitness or arts expenses for children under 16 years old</b>				
<b>Moving expenses (at least 40kms)</b>				
<b>First time Home Buyers Tax Credit</b>				
<b>Search and Rescue/Firefighter Volunteer TC (200 hours of eligible service for eligible org)</b>				
<b>Pay or receive alimony or maintenance payments</b>				
<b>Child Care expenses so you and/or spouse could work or attend school</b>				
<b>Incur expenses to earn investment income (i.e. investment counsel fees, interest)</b>				
<b>Charitable or Political donations</b>				
<b>You, spouse, or child become disabled during the year</b> (Form T2201 to be completed by physician)				
<b>Pay premiums for extended medical coverage or any medical expenses for which you were not reimbursed</b>				
<b>Incur expenses to maintain an office in your home as required by your employer</b> (Form T2200 to be completed by employer, provide details of GST/HST paid by you on expenses)				
<b>Incur any automotive or business expenses as an employee</b> (Form T2200 to be completed by employer + Auto Log)				
<b>Buy any tradesman's or apprentice mechanic's tools</b>				
<b>You, spouse, or any of your dependent children attend university or college</b> (Form T2202A/T2202/TL11B/TL11 C slip signed by student)				
<b>Support any relative who were disabled? Or did you reside with and provide home-in care for parent or grandparent who is over 65, or for an infirm dependent adult relative</b> (Details including income of person receiving the care)				

<b>How did you hear about our firm? Online, referral, friend, TV, or other?</b>	
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