



2019 Personal Tax Organizer

Individual 1:	
Name	
Social Insurance Number	
Date of Birth	
Marital Status	
Phone number	
Email Address	
Address	
Individual 2 :	
Name	
Social Insurance Number	
Date of Birth	
Phone number	
Email Address	

Dependent's Name	Relationship	Date of Birth	Net Income

Other Information	
Are you a Canadian Citizen?	Yes___ No___
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?	
	Yes___ No___
Are you a U.S. citizen or green card holder?	Yes___ No___
Are/were either of your parents born in the United States?	Yes___ No___
Did you own foreign property at any time in 2019 with a total cost of more than \$100,000 CAD?	Yes___ No___
How would you like your tax return printed :	Hard copy___ or PDF Copy___

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



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	YES	NO	YES	NO
Income from sources outside Canada (Slips or details where no slips available)				
Rental/Business/Professional/Farming income (Details of income and expenses)				
Investment portfolio year end tax reporting package (Details of transactions, gain / loss report, foreign property reporting)				
Capital gains or losses (Real Estate, etc.)				
Sale of Principal Residence (address of property, year of acquisition, cost, proceeds)				

	Individual 1		Individual 2	
TAX DEDUCTIONS – FOR THIS TAXATION YEAR	YES	NO	YES	NO
RRSP contributions				
Pay interest on student loan				
Pay union or professional dues				
Adoption expenses				
Moving expenses (at least 40kms)				
First time Home Buyers Tax Credit (tax credit up to \$5000)				
Search and Rescue/Firefighter Volunteer TC (200 hours of eligible service for eligible org)				
Pay or receive alimony or maintenance payments				
Child Care expenses so you and/or spouse could work or attend school				
Incur expenses to earn investment income (i.e. investment counsel fees, interest)				
Charitable or Political donations				
You, spouse, or child become disabled during the year (Form T2201 to be completed by physician)				
Pay premiums for extended medical coverage or any medical expenses for which you were not reimbursed				
Incur expenses to maintain an office in your home as required by your employer (Form T2200 to be completed by employer, provide details of GST/HST paid by you on expenses)				
Incur any automotive or business expenses as an employee (Form T2200 to be completed by employer + Auto Log)				
Buy any tradesman's or apprentice mechanic's tools				
You, spouse, or any of your dependent children attend university or college (Form T2202A/T2202/TL11B/TL11 C slip signed by student)				
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 (Details including income of person receiving the care)				
Support for BC Senior's & Persons with Disabilities – home renovation credit				