

DOCUMENT ORGANIZER

For the year _____

BASIC INFORMATION

- Personal information
- Dependant Information
- Prior year notice of assessment
- Prior year tax return

SLIPS

EMPLOYMENT INCOME

- T4 slips - Employment income
- T4E slip – Employment insurance and other benefits
- T4PS slip – Income from profit sharing plans
- T5007 slip – Workers' compensation benefit

PENSION INCOME

- T4A slips – Pension, retirement and annuity income
- T4A(OAS) slip – Old age security pension
- T4A(P) slip – CPP/Disability benefits
- T4A-RCA slip – Retirement compensation arrangements
- T4RIF slip – RRIF income
- T4RSP slip – RRSP income

INVESTMENT INCOME

- T5 slips – Investment income
- T5008 slip – Income from securities transactions
- T3 slips – Income from trust allocations
- T5013 slip – Partnership income

INCOME NOT REPORTED ON SLIPS

- Capital gains/losses
- Rental income statement
- Self-employment statement

DEDUCTIONS

- Charitable donations
- Childcare expenses
- Educator school supplies
- Interest on student loan
- Medical expenses
- Moving expenses
- Political donations
- RRSP Contributions
- Spousal support payments
- T2200 and summary of deductible employment expenses
- T2202 – Tuition and enrollment certificate
- Tax instalments paid
- Tuition/Education amount for self
- Tuition/Education transferred from dependant
- Union and professional dues

OTHER INFORMATION

- Specified foreign property

PERSONAL INFORMATION

Last name: _____ First name: _____

Social Insurance Number: _____ Date of birth: _____

Address: _____

Email: _____ Phone number: _____

Marital status: Married Single Common-law
 Separated Divorced Widowed

If married or common-law, should your return be filed jointly with your spouse's return?

Yes No

If marital status changed during the year, provide date of change: _____

Name of spouse: _____

Is the taxpayer a US citizen? Yes No

RESIDENCE

Province or territory of residence on December 31: _____

Did the taxpayer immigrate to Canada or emigrate from Canada during the year?

Yes No

If yes, provide date of entry into Canada _____ or date of departure _____

ELECTIONS CANADA

Is the taxpayer a Canadian citizen? Yes No

If yes, does the taxpayer authorize 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

FOREIGN REPORTING – T1135

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

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: _____

DEPENDANTS

DEPENDANT #1

Name: _____ Relationship: _____
Date of birth: _____ Social insurance number: _____
Physically or mentally infirmed? Yes No Income: _____
Childcare expenses: _____

DEPENDANT #2

Name: _____ Relationship: _____
Date of birth: _____ Social insurance number: _____
Physically or mentally infirmed? Yes No Income: _____
Childcare expenses: _____

DEPENDANT #3

Name: _____ Relationship: _____
Date of birth: _____ Social insurance number: _____
Physically or mentally infirmed? Yes No Income: _____
Childcare expenses: _____

DEPENDANT #4

Name: _____ Relationship: _____
Date of birth: _____ Social insurance number: _____
Physically or mentally infirmed? Yes No Income: _____
Childcare expenses: _____

DEPENDANT #5

Name: _____ Relationship: _____
Date of birth: _____ Social insurance number: _____
Physically or mentally infirmed? Yes No Income: _____
Childcare expenses: _____

INVESTMENT INCOME/DEDUCTIONS

CAPITAL GAINS

Capital gains (losses) on stock investments

Property Description	Quantity	Acquisition date	Disposal date	Proceeds	Cost	Expenses

Please provide broker reports or brokerage statements.

Real Estate

Property description: _____

Cost \$ _____

Date of purchase: _____

Proceeds of disposition \$ _____

Date of disposition: _____

Other expenses \$ _____

Describe use of property: _____

Is this a principal residence? Yes No

Please provide the following:

- Purchase documents
- Details of capital additions
- Sale documents

Listed Personal Property

Property description: _____

Cost \$ _____

Date of purchase: _____

Proceeds of disposition \$ _____

Date of disposition: _____

Other expenses \$ _____

DEDUCTIONS

Commissions \$ _____

Interest expense: \$ _____