

**PERSONAL TAX ORGANIZER**  
**For the year 2023**

Please complete this T1 Organizer before your appointment. Please attach all applicable slips, lists, and other supplemental information for each question answered "Yes".

**1. Personal Information** (\*existing clients – please complete section 1. for any changes)

Name		Gender	SIN	Date of Birth (dd/mm/year)	Phone Number	
Taxpayer		<input type="checkbox"/> M <input type="checkbox"/> F <input type="checkbox"/> X			Mobile	
Spouse		<input type="checkbox"/> M <input type="checkbox"/> F <input type="checkbox"/> X			Office	
Email:					Home	
Address						

Have you registered with CRA My Account online?  Yes  No

Marital Status:  Married  Single  Common-law  Divorced  Widow

If married or common-law, are we preparing the personal returns for you and your spouse?  Yes  No

If no, provide the amount from line 23600 of your spouse's return: \_\_\_\_\_

If marital status changed during the year, provide date of change (dd/mm): \_\_\_\_\_

Were you or your spouse born in the U.S., a U.S. citizen or Green Card holder?  Yes  No

**2. 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 (dd/mm): \_\_\_\_\_ or date of departure \_\_\_\_\_

**3. Elections 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** (excludes personal use-use property, such as a property used exclusively for vacation)

Did the taxpayer own or hold foreign property with a total cost between CAN\$100,000 and CAN\$250,000 at any time during the year?  Yes  No

If yes, provide the total foreign income and capital gains earned during the year

Did the taxpayer own or hold foreign property with a total cost of more than CAN\$250,000 at any time  Yes  No

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during the year?

If yes, provide a detailed list by foreign property / asset of income and capital gains earned during the year

Did the taxpayer, or together with family members, have a 10 percent or more interest in a non-resident corporation.

Yes  No

If yes, contact us to discuss the relevant information required to prepare the tax form T1134.

Did the taxpayer receive a contribution from or make a contribution to a foreign trust?

Yes  No

If yes, contact us to discuss the relevant information required to prepare the tax forms T1142 / T1141.

**5. Change in Personal or Financial Situation during the Year**

Did the taxpayer declare bankruptcy during the year?

Yes  No

If yes, date bankruptcy was declared: (dd/mm): \_\_\_\_\_

**6. Dependants**

Name	Relationship	Date of Birth (mm/dd/year)	SIN	Physically or Mentally Infirm? (Y/N)	Income	Child Care Expenses? (Y/N)

Canada Child Care Benefit (CCB) recipient?

Yes  No

**7. General Income/Deductions**

T4 slips—Employment income?

Yes  No

T4A—Commission and self-employment?

Yes  No

—Canada emergency or recovery benefits?

Yes  No

T4E—Employment insurance benefits?

Yes  No

T5007—Social assistance, workers compensation or net federal supplement?

Yes  No

Employment income, taxable benefits or other income (e.g. tips and gratuities) not shown on the T4 slip? \_\_\_\_\_

Union and profession dues

Yes  No

If yes, please provide:

Name of Organization	Amount

List of child care expenses, with receipts, for each child under the age of 17 or eligible for the Disability Tax Credit?  Yes  No

List of moving expenses paid in the year, only if you moved to be 40 kms closer to a new work, business location or school?  Yes  No

List of spousal support payments made or received?  
If yes, provide copy of relevant agreement and amendments that have not been previously given to us.  Yes  No

List of deductible employment expenses?  
If yes, provide the completed T2200 form signed by your employer  Yes  No

Work from home at least 50% of the time in 2023?  
If yes, provide the completed T2200 form signed by your employer  Yes  No

**8. Pension Income**

T4A—Pension, retirement, and annuity income?  Yes  No

T4AP—Canada pension plan benefits?  Yes  No

T4A(OAS)—Old age security pension slip/foreign pensions?  Yes  No

T4A(RCA)—Retirement compensation arrangements?  Yes  No

T4RSP—Registered retirement savings plan income?  Yes  No

T4RIF—Registered retirement income fund income?  Yes  No

Does the taxpayer elect to split eligible pension income with his/her spouse or common-law partner?  Yes  No

**9. Investment income**

T3—Income from trust allocations?  Yes  No

T5—Investment income?  Yes  No

T5013 —Partnership income?  Yes  No

T5008—Income from securities transactions?  Yes  No

Did the taxpayer dispose of property or investments during the year (excluding principal residence)?  Yes  No

If yes, provide the following details in a separate list:  
**(Note: The taxpayer's broker should be able to provide a realized gains and losses schedule that provides these details)**

Description of Property and Quantity	Date Acquired (mm/dd/year)	Disposal Date (mm/dd/year)	Sales Proceeds	Cost	Expenses on Disposal

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Did the taxpayer sell a principal residence during the year?  Yes  No

If the property was taxpayer's principal residence for all years owned, provide the following information:

a) If the property was taxpayer's principal residence for all years owned, provide the following information:

Description and Address	Date Acquired	Sale Proceeds

b) If the property was not taxpayer's principal residence for all years owned, provide the following information:

Description and Address	Date Acquired	Date of Disposal (dd/mm)	Sale Proceeds	Original Cost

Expenses on disposal	Adjust cost base at time of disposition (original cost plus capital additions)	If owned prior to 1982, fair market value on Dec 31, 1981	If owned prior to 1982, adjusted cost base on Dec 31, 1981	Years the property was designated as a principal residence

Interest paid to earn investment income \_\_\_\_\_ Management fees (non-registered accounts only) \_\_\_\_\_ Deductible accounting/legal fees \_\_\_\_\_

**10. Self-Employment/Business Income**

Financial statement(s)/schedule of revenue and expenses attached?  Yes  No

If the taxpayer used a vehicle for business, are the vehicle expenses and both total and business mileage 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 attached?  Yes  No

Is a list of all asset additions and disposals (including cars, equipment, etc.) attached?  Yes  No

**11. Rental Income**

If the taxpayer owned rental property, is a statement of rental income attached?  Yes  No

Does the taxpayer also live in the rental property (in which case no CCA should be claimed)?  Yes  No

**12. RRSP/PRPP/FHSA Contributions**

Receipts for contributions made attached?  Yes  No

Were any amounts withdrawn or repaid during the year to a home buyers' plan, a lifelong learning plan or first home savings account?  Yes  No

**13. Tax Credits**

T2202A—Tuition amount for taxpayer?  Yes  No

T2202A—Tuition amount claimed on transfer from dependant (**T2202A slip must be signed**)  Yes  No

TL-11A – Tuition amount for taxpayer attending a university outside of Canada (full time students only)?  Yes  No

Receipts and listing of all medical expenses paid in the year for taxpayer, spouse, and dependants?  Yes  No

Receipts for charitable donations or donations made by way of gifting an item in kind?  Yes  No

Receipts for political contributions?  Yes  No

List of eligible teaching supplies purchased (for teachers and early childhood educators only)?  Yes  No

Public transit passes for travel by Ontario seniors only (receipts/details)?  Yes  No

Information pertaining to the purchase of a new home to claim the first-time home buyer's amount?  Yes  No

Is the taxpayer eligible to claim the disability amount?  Yes  No  
If yes, provide a completed form T2201E, unless it has been previously supplied to us.

Receipts for eligible expenses for improvement to your principal residence to allow a senior to gain access to, or be more mobile/functional with the home (must be eligible for the disability tax credit)?  Yes  No

Property taxes/rent paid in the year and landlord/municipality?  Yes  No  
If yes, provide a copy of the assessment and / or rent receipt that provides proof of payment and includes the following:

Amount \_\_\_\_\_ Name of Landlord \_\_\_\_\_ Municipality \_\_\_\_\_

**14. Ontario Trillium Benefit**

Have you received the Ontario senior homeowners' property tax grant in 2022?  Yes  No

Did you reside in a designated student residence in 2023?  Yes  No

Did you have a qualified dependant in 2023?  Yes  No

Did you reside in a principal residence in Northern Ontario on December 31?  Yes  No

If, on December 31, you and your spouse or common-law partner occupied separate principal residences for medical reasons, and you are choosing to apply for the OEPTC, the NOEC, or the OSHPG individually, tick this box.

Involuntary separation – Enter the address of your spouse or common-law partner:

\_\_\_\_\_

**Amount paid for a principal residence for 2023**

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Data transferred to the spouse

Yes  No

Principal residence - Address	Number of months resident in 2023	*Type of amount	Amount paid for 2023	Name of landlord, municipality or supplier to whom payment was made

\*Type of amount: Rent / Property tax / Home energy costs for your principal residence on a reserve in Ontario / Accommodation in a public or non-profit long-term care home

**15. 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, have prior tax returns and corresponding Notices of Assessment been provided to us.

Yes  No

Is a copy of any other correspondence from the Canada Revenue Agency attached?

Yes  No

Where instalments paid for the year current tax year?

Yes  No

If yes, attached the installment statement and what was the amount paid: \_\_\_\_\_

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**Appendix A - Self Employed Revenue and Expenses Schedule**

Note - If taxpayer is registered for HST, then revenue and expenses should exclude HST. If taxpayer has elected to use the Quick method in calculating HST or is not registered for HST then expenses should include HST.

If you are self-employed, do the following expenses include GST/HST? (Y/N)

Yes     No

If you are registered for HST, your HST Number: \_\_\_\_\_ RT0001

Description	Amount (\$)	HST (\$)
Revenue		
<u>Operating expense (only if business related)</u>		
Material purchases		
Subcontracts		
Advertising & promotion, including gifts		
Restaurants (list 100% here, 50% will be claimed) (no single meals)		
Bad debts		
Business insurance		n/a
Interest		n/a
Loan interest, line of credit interest for business loans		n/a
Membership fees & union dues (please attach receipts)		
Newspapers, magazines, periodicals & trade publications		
Professional development & training		
Computer software		
Office expenses		
Office supplies, stationery, printing, business cards		
Computer supplies, printer supplies		
Supplies		
Legal and accounting		
Management fees, agent fees, commissions		
Office rent		
Equipment rent		
Repairs & maintenance to equipment, computers, etc.		
Salaries (including employer's contributions)		
Commissions paid, allowances, bonuses		
Business travel (train, airfare, hotel, car rental)		
Single meal restaurant receipts (out of town only)		
Taxi, TTC, public transit		
Telephone (business or fax line only, not home line)		
Utilities for rented space		
Cell phone		
Courier & postage		
Assets purchased this year: Equipment and furniture		

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Assets purchased this year: Computer hardware

Assets purchased this year: Computer software

Assets purchased this year: Other

Research costs

Internet fees

Bank charges

Private health insurance premiums

Other expenses related to your business, not listed above (please detail below):

	n/a
	n/a

Business use of car:

Business KM:	Total KM:	Business %

Year & Make of vehicle:

Date Acquired (dd/mm/yy):

Cost (not incl. GST/HST):

GST/HST amount:


(note: please provide a copy of lease or purchase agreement for 2021 acquisitions; if financed, please provide the documentation)

(List 100% of these car expenses):

Amount (\$)      HST (\$)

Vehicle gas

Vehicle parking-business only

Vehicle repairs and maintenance

Vehicle insurance

Vehicle/driver license

Vehicle lease payments

Number of months leased during the year: \_\_\_\_\_

Vehicle car washes

Vehicle motor league fees

Vehicle toll Fees

	n/a
	n/a
	n/a

**Home office / studio / storage in the home calculations:**

Square footage of work space:

Total square footage of house:

Business %


Mortgage interest only

Amount (\$)	HST (\$)
	n/a



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Rent  
 Property tax  
 Gas/oil  
 Hydro  
 Water/waste management  
 Security system  
 Lawn maintenance & snow removal  
 Condo Fees  
 Repairs & maintenance  
 Home insurance

	n/a
	n/a
	n/a
	n/a
	n/a

**Appendix B - Rental Revenue and Expenses Schedule**

If rental unit is in your residence: % of house rented: \_\_\_\_\_

Address of Rental property

How many rental units: \_\_\_\_\_

	Amount (\$)
Total rental income	<input type="text"/>
Mortgage interest	<input type="text"/>
Property tax	<input type="text"/>
Gas/oil	<input type="text"/>
Hydro	<input type="text"/>
Water	<input type="text"/>
Bottled water	<input type="text"/>
Security system	<input type="text"/>
Lawn maintenance & snow removal	<input type="text"/>
Condo Fees	<input type="text"/>
Repairs and maintenance	<input type="text"/>
Home insurance	<input type="text"/>

Date acquired (dd/mm/yy):

Original Cost, including legal fees, real estate commissions and all closing costs