

## 2020 Personal Tax Organizer

### 1. Personal Information

	Name	SIN	Date of Birth	Phone (W)	E-mail
Taxpayer					
Spouse					
Address				Phone (H)	

Marital Status: Married \_\_\_ Single \_\_\_ Common-Law \_\_\_ Separated \_\_\_ Divorced \_\_\_ Widowed \_\_\_  
 If married or common-law, should your tax return be filed jointly with your spouse's return? Yes \_\_\_ No \_\_\_

### 2. Elections Canada

Do you authorize CRA to provide information to Elections Canada to update the National Register of Electors? Yes \_\_\_ No \_\_\_  
 Are you a Canadian citizen? Yes \_\_\_ No \_\_\_ Details \_\_\_\_\_

### 3. Foreign Reporting

Did you own or hold foreign property with a total cost of \$100,000 CAN or more at any time in the year? Yes \_\_\_ No \_\_\_  
 If the answer is yes, can you ask your investment advisor to provide a T1135 Foreign Reporting Summary for 2020.

### 4. Change in Personal or Financial Situation During the Year

Did your marital status change during the year? Yes \_\_\_ No \_\_\_ if yes, Date of Change \_\_\_\_\_  
 Did taxpayer become deceased during the year? Yes \_\_\_ No \_\_\_ if yes, Date of Death \_\_\_\_\_  
 Did you declare bankruptcy during the year? Yes \_\_\_ No \_\_\_  
 Did you refinance a business with new or revised debt? Yes \_\_\_ No \_\_\_ Details \_\_\_\_\_  
 Did you close an investment account? Yes \_\_\_ No \_\_\_ Details \_\_\_\_\_  
 Has anyone become disabled during the year? Yes \_\_\_ No \_\_\_ T2201 \_\_\_\_\_  
 Are you a caregiver? Yes \_\_\_ No \_\_\_ Details \_\_\_\_\_  
 Do you care for a member of your family? Yes \_\_\_ No \_\_\_ Details \_\_\_\_\_  
 Did you move during the year from another province? Yes \_\_\_ No \_\_\_

### 5. Dependants

Name	Relationship	Date of Birth	SIN	Disability Amount	Income

Did you pay for child care in 2020? Yes \_\_\_ No \_\_\_ Details \_\_\_\_\_

### 6. Employment Income / Deductions

Did you earn income from employment? Yes \_\_\_ No \_\_\_ T4's \_\_\_\_\_  
 Did you receive Employment Insurance? Yes \_\_\_ No \_\_\_ T4E \_\_\_\_\_  
 Did you receive the CERB (Canada Emergency Response Benefit)? Yes \_\_\_ No \_\_\_  
 Did you receive taxable benefits not shown on T4 slip? Yes \_\_\_ No \_\_\_  
 Did you receive any commission income? Yes \_\_\_ No \_\_\_  
 Did you receive WCB compensation slip T5007? Yes \_\_\_ No \_\_\_  
 Did you pay union or professional dues? Yes \_\_\_ No \_\_\_ Details \_\_\_\_\_  
 Are you claiming deductible employment expenses? Yes \_\_\_ No \_\_\_ T2200 \_\_\_\_\_  
 Did you work from home due to COVID? Yes \_\_\_ No \_\_\_  
 Did you participate in an employee profit sharing plan? Yes \_\_\_ No \_\_\_ T4PS \_\_\_\_\_  
 Did you purchase tools as an employee in 2020? Yes \_\_\_ No \_\_\_ Receipts \_\_\_\_\_  
(need more than \$1,000 to be useful)  
 Do you receive tips? Yes \_\_\_ No \_\_\_ (If yes, please provide amount received on a signed form)  
 Were you an apprentice during 2020? Yes \_\_\_ No \_\_\_ (If yes, we need an ITA summary to verify status and trade)  
 Are you an eligible educator and qualify for school supply tax credit? Yes \_\_\_ No \_\_\_

**7. Pension Income**

Did you receive pension income? Yes \_\_\_ No \_\_\_  
 Old Age Security T4(OAS) \_\_\_ CPP T4A(P) \_\_\_ Pension T4A \_\_\_ RRSP /RPP/RRIF/T4RSP/T4RIF \_\_\_  
 If beneficial do you want to split pension income? Yes \_\_\_ No \_\_\_

**8. Investment Income / Deductions**

Did you receive investment income? Yes \_\_\_ No \_\_\_  
 Interest (T5/T600) \_\_\_ Dividends (T5) \_\_\_ Estate/ Trust (T3) \_\_\_ Partnership / Tax Shelters (T101/T5013) \_\_\_  
 Did you pay interest to earn income? Yes \_\_\_ No \_\_\_ Details \_\_\_\_\_  
 Did you pay accounting or legal fees? Yes \_\_\_ No \_\_\_ Details \_\_\_\_\_

Did you dispose of property during the year including your principal residence? If so, provide the following details:

Description of Property	Date Bought	Date Sold	Proceeds	Cost	Expenses

Do you have the realized capital gains and losses summary from your broker? Yes \_\_\_ No \_\_\_  
 Do we have details of previous capital gains exemptions, business investment losses and CNIL accounts? Yes \_\_\_ No \_\_\_

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

Were you self-employed during the year? Yes \_\_\_ No \_\_\_ Details \_\_\_\_\_  
 Did you employ an eligible apprentice in 2020? Yes \_\_\_ No \_\_\_ Details \_\_\_\_\_

**10. Rental Income**

Did you have rental income? Yes \_\_\_ No \_\_\_ If yes, please provide summary of rental expenses

**11. RRSP Contributions/Withdrawals**

Did you make an RRSP contribution during 2020? Yes \_\_\_ No \_\_\_ Receipts \_\_\_\_\_  
 Did you repay a Home Buyer plan amount? Yes \_\_\_ No \_\_\_  
 Did you repay a Life Long Learning amount? Yes \_\_\_ No \_\_\_  
 Did you make a withdrawal from your RRSP during the year? Yes \_\_\_ No \_\_\_

**12. Other Items**

Did you pay any tuition for yourself? Yes \_\_\_ No \_\_\_ T2202 \_\_\_\_\_  
 Do you have a tuition transfer from a dependant? Yes \_\_\_ No \_\_\_ T2202 \_\_\_\_\_  
 Did you pay interest on a student loan? Yes \_\_\_ No \_\_\_ Receipts \_\_\_\_\_  
 Did you receive a scholarship, fellowship or bursary? Yes \_\_\_ No \_\_\_ Receipts \_\_\_\_\_  
 Did you pay child support? Yes \_\_\_ No \_\_\_ Receipts \_\_\_\_\_  
 Did you incur medical expenses? Yes \_\_\_ No \_\_\_ Receipts \_\_\_\_\_  
 Did you make charitable donations? Yes \_\_\_ No \_\_\_ Receipts \_\_\_\_\_  
 Did you make political donations? Yes \_\_\_ No \_\_\_ Receipts \_\_\_\_\_  
 Did you make income tax installments? Yes \_\_\_ No \_\_\_ Amounts \_\_\_\_\_  
 Did you receive spousal support? Yes \_\_\_ No \_\_\_ Amounts \_\_\_\_\_  
 Did you pay spousal support? Yes \_\_\_ No \_\_\_ Amounts \_\_\_\_\_  
 Did you move during the year to earn income? Yes \_\_\_ No \_\_\_ Details \_\_\_\_\_  
 Were you a first time home buyer in 2020? Yes \_\_\_ No \_\_\_ Was the home brand new? Yes \_\_\_ No \_\_\_  
 Did you incur adoption related expenses? Yes \_\_\_ No \_\_\_  
 Did you buy back any pension plan contributions for past service? Yes \_\_\_ No \_\_\_  
 Did you or your child make a withdrawal from an RESP during the year? Yes \_\_\_ No \_\_\_  
 Did you volunteer for 200 eligible hours as a volunteer firefighter or search and rescue member in 2020? Yes \_\_\_ No \_\_\_  
 Certification \_\_\_\_\_  
 If you are a senior, did you renovate your home for a medical need? Yes \_\_\_ No \_\_\_  
 Did you purchase a zero emission vehicle? Yes \_\_\_ No \_\_\_

**13. Prior Year Tax Return Information / Correspondence**

Do we have a copy of last years tax return? Yes \_\_\_ No \_\_\_  
 Do we have a copy of last years Notice of Assessment? Yes \_\_\_ No \_\_\_