

2021 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 2021.

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. Dependents

Name	Relationship	Date of Birth	SIN	Disability Amount	Income

Did you pay for child care in 2021? 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 and/or repay any COVID related benefits ? Yes No CERB, CRB, CRSB, CRCB, CESB, CEWS, CERS
Did you work from home due to COVID? Yes No Did your employer provide a T2200 or T2200S?
 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 participate in an employee profit sharing plan? Yes No T4PS _____
 Did you purchase tools as an employee in 2021? 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 2021? 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 Receipts up to \$1,000

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

Did you have a change-in-use of your property during the year? i.e create a rental suite Yes ___ No ___
 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 2021? 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 2021? 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 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 2021? 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 2021? Yes ___ No ___
 If you are a 65 or older, did you renovate or alter your home for a medical need? Yes ___ No ___
 Did you purchase an electric or 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 ___