

CANADIAN INDIVIDUAL INCOME TAX RETURN ORGANIZER

FOR CALENDAR (TAX) YEAR _____ CURRENT DATE _____

(Couples must each complete a separate organizer)

TO AVOID DELAY WITH YOUR RETURN PLEASE ANSWER ALL QUESTIONS AND PROVIDE COPIES OF APPLICABLE DOCUMENTATION

1. Name _____ Telephones: Home: _____ Office: _____

2. Address _____ Cell: _____ Fax: _____
Email: _____

3. Social Insurance Number _____ Date of Birth _____

4. Marital Status: Married Living common-law Widowed Divorced Separated Single

5. Name of your spouse, if applicable _____ Spouse's Social Insurance Number _____
Spouses total income _____

6. Dependent Children: Name _____ Year Born _____ Did each live with you all year Yes No

7. Province, state, or territory of residence at year-end. _____

8. Number of day spent in Canada during the calendar year _____

9. Date you became, or ceased to be, a resident of Canada during the year (if applicable) (Entry) _____ (Departure) _____

10. Did you own or hold foreign (non-Canadian) property at any time in 2013 with a total cost of more than C\$100,000?
If yes, please list each type of property _____ Cost _____

11. Attach receipt (as mailed to you by the Tax Department) for 2013 income tax paid by installments. Yes/No? _____
Comments: _____

12. Did you receive income from any of the following sources?

a) i) Salary or commission (attach T-T4-A slips) Yes/No? _____ Comments: _____

ii) Allowance for automobile or other expenses Yes/No? _____ Comments: _____

iii) Tips and gratuities Yes/No? _____ Comments: _____

b) Unemployment Insurance benefits (attach T4U slip) Yes/No? _____ Comments: _____

c) Old Age Security Pension (attach T4A OAS slip) Yes/No? _____ Comments: _____

d) Canada Pension Plan (attach T4A slip) Yes/No? _____ Comments: _____

e) Business, farming or partnership income Yes/No? _____ Comments: _____

f) Dividends (attach T5 slips) Yes/No? _____ Comments: _____

g) Bond interest (attach T5 slips) Yes/No? _____ Comments: _____

h) Bank interest (attach T5 slips) Yes/No? _____ Comments: _____

i) Mortgage or loan interest (attach T5 slips) Yes/No? _____ Comments: _____

j) Rental (give address of property along with a list of revenue and expenses on a separate sheet) Yes/No? _____

Comments: _____

k) Alimony, maintenance or separation allowance Yes/No? _____ Comments: _____

l) Bursaries and scholarships Yes/No? _____ Comments: _____

m) Other income (e.g. annuities, pensions, royalties, registered retirement savings plans, etc.) Attach T4A, T4RSP, T4A(P) slips.
Yes/No? _____ Comments: _____

13. Did you dispose of any capital properties such as?

a) Personal use property Yes/No? _____ Comments: _____

b) Real Estate Yes/No? _____ Comments: _____

c) Principal residence Yes/No? _____ Comments: _____

d) Stocks, bonds, debentures and other investments Yes/No? _____ Comments: _____

If any of the above have been answered "Yes" it is necessary for you to determine the basis of valuation to be used. Please supply all details of sales or disposals.

14. Did you incur any expenses (interest, safety deposit box, carrying charges, etc.) in connection with income reported above? (If "Yes", please provide a detailed list and the amount) Yes/No? _____ Comments: _____
Were any assets purchased in connection with earning of income (automobiles, equipment)? Please provide details. Yes/No? _____
Comments: _____

15. Did you contribute to a registered pension, retirement savings plan, education savings plans, tax-free savings account, accounts management trust for minors, or other U.S. tax deferred plans? If so, attach receipts, along with Canada Customs and Revenue Agency notification for the maximum allowable. Yes/No? _____ Comments: _____
Did you contribute to a US 401(k)? Yes/No? _____ Comments: _____

16. Did you make any charitable, religious or political donations? If so, attach receipts. Yes/No? _____
Comments: _____

17. Did you incur any medical expenses? (attach receipts) Yes/No? _____ Comments: _____

18. Did you pay any union, professional dues or tuition fees? Yes/No? _____ Comments: _____

19. Did you pay alimony or separation allowance? Yes/No? _____ Comments: _____

20. Did you incur any childcare expenses? Please provide the name, address, SIN number of recipient and the amount paid.
Yes/No? _____ Comments: _____

21. Did you incur any employment expenses? Please provide description and amount. Yes/No? _____
Comments: _____

22. If you took a new job during the year and moved 40km (25 miles) or more closer to your new job, did you incur moving expenses?
Yes/No? _____ Comments: _____

23. If you incurred any limited partnership losses and exploration and development expenses, provide details.

24. Provincial Property Tax Credit: a) Rent paid in 2013 for leased living quarters \$ _____
b) Property tax paid in 2013 for principal residence \$ _____
c) Length of time at each address. _____

25. Disability deduction is applicable if you or your spouse were mentally or physically impaired at any time during the year or confined to a bed or wheelchair for a substantial period each day. _____

26. If we have not previously prepared your income tax returns, include a copy of your 20012 income tax return.

27. Please include a copy of the Canada Customs and Revenue Agency **NOTICE OF ASSESSMENT** for your previous year's income tax return.

28. Have you answered all questions & supplied all documents requested on this questionnaire? Yes/No? _____
If "No" please explain, otherwise your tax return may be delayed and/or the fee may be increased because of the extra time required.