| PERSONAL TA | X RETURN | ORGANIZER |
|--------------|----------|------------------|
| For the year | | |

Please complete this T1 Organizer before your appointment.

| | | N1 | | CIN | D-4- (CD) (I | DI /D |
|--|--|---|--|---------------|-------------------|---------------------|
| F | 1 | Name | | SIN | Date of Birth | Phone (Bus. |
| Faxpayer Spouse | | | | | | |
| Address | | | | 1 | | Phone (Res. |
| Marital Status | s: Married | Single | Common-law | Separated | Divorced | I Widowed |
| f married or | common-law, should yo | our tax return be fil | ed jointly with your spo | use's return? | Yes | No |
| 2. Electi | ions Canada | | | | | |
| | authorizes the CRA to pada to update his/her in | | | | Yes | No |
| | | | | | | |
| 3. Forei | gn Reporting | | | | | |
| Did the taxpa | gn Reporting Byer own or hold foreigning the year? | property with a to | tal cost of more than \$ | 00,000CAN at | Yes | No |
| Did the taxpa | ayer own or hold foreign | | | | Yes | No |
| old the taxpa ny time duri | ayer own or hold foreigning the year? | Financial Sit | uation During th | | Yes | No No |
| olid the taxpa ny time duri 1. Changoid the taxpa | ayer own or hold foreign ing the year? ge in Personal or ayer's marital status cha | Financial Sit | uation During th | e Year | | |
| Did the taxpa any time duri 1. Chang Did the taxpa Did the taxpa If yes, p | ayer own or hold foreign ing the year? ge in Personal or ayer's marital status cha | Financial Sit | uation During th | e Year | Yes | No |
| Did the taxpa ny time duri 1. Chang Did the taxpa Did the taxpa If yes, p date or c | ayer own or hold foreigning the year? ge in Personal or ayer's marital status chatayer immigrate to Canadarovide: e of entry into Canada | Financial Sitinge during the year a or emigrate from | uation During th | e Year | Yes | No |
| Did the taxpa Oid the taxpa Oid the taxpa If yes, p date or co Oid the taxpa | ayer own or hold foreigning the year? ge in Personal or ayer's marital status chat ayer immigrate to Canada rovide: e of entry into Canada date of departure ayer become deceased of | Financial Sitinge during the year a or emigrate from | uation During th | e Year | Yes Yes | No No |
| Did the taxpa I. Change Did the taxpa If yes, p date or co Did the taxpa If yes, p date | ayer own or hold foreigning the year? ge in Personal or ayer's marital status chata ayer immigrate to Canada rovide: e of entry into Canada date of departure ayer become deceased or rovide: | Financial Sitempe during the year a or emigrate from the year? | uation During th | e Year | Yes Yes | No No |
| Did the taxpa I. Change I. Change If yes, p date or co Did the taxpa If yes, p date or do Did the taxpa If yes, p | ayer own or hold foreigning the year? ge in Personal or ayer's marital status chat ayer immigrate to Canada rovide: e of entry into Canada date of departure ayer become deceased or rovide: e of death | r Financial Sitempe during the year a or emigrate from during the year? | uation During the r? Canada during the yea - | e Year | Yes Yes Yes | No No |

| 5. Dependants | | | | | |
|---------------|--------------|---------------|-----|-------------------|--------|
| Name | Relationship | Date of Birth | SIN | Disability Amount | Income |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

| 6. Employment Incor | ne/Deductions | | | |
|-----------------------------------|----------------------------|-------------------|--------------------------|----------------|
| Did the taxpayer earn income from | om employment? | | Yes | No |
| If yes, are T4 slips atta | ched? | | Yes | No |
| Did the taxpayer receive Employ | ment Insurance? | | Yes | No |
| If yes, is the T4E slip a | ttached? | | Yes | No |
| Did the taxpayer receive taxable | benefits not shown on the | T4 slip? | Yes | No |
| Did the taxpayer receive any em | ployment income in the for | m of commission? | Yes | No |
| Did the taxpayer receive a GST | rebate? | | Yes | No |
| If yes, amount receive | d: | _ | | |
| Did the taxpayer pay union/prof | essional dues? | | Yes | No |
| If yes, provide details: | | | | |
| Is the taxpayer claiming deducti | ble employment expenses? | | Yes | No |
| If yes, is a signed T220 | 00 attached? | | Yes | No |
| Does the taxpayer participate in | an employee profit-sharing | plan? | Yes | No |
| If yes, is the T4PS slip | attached? | | Yes | No |
| 7. Pension Income | | | | |
| Did the taxpayer receive pension | n income? | | Yes | No |
| If yes, are the appropr | iate T slips attached? | | Yes | No |
| Old Age Security T4(OAS) | CPP/QPP T4A(P) | Pension T4A | RRSP /RPP /RRIF T4R | SP/T4RRIF |
| 8. Investment Incom | e/Deductions | | | |
| Did the taxpayer earn investmen | nt income? | | Yes | No |
| If yes, are the appropr | iate T slips attached? | | Yes | No |
| Interest (T5/T600) | Dividends (T5) | Estate/Trust (T3) | Partnership/Tax Shelters | s (T101/T5013) |

Did the taxpayer dispose of property during the year? If so, provide the following details:

| P. Self-Employment/Business Income Was the taxpayer self-employed during the year? Yes No If yes, is (are) the appropriate self-employment statement(s) attached? Yes No If an owner/manager, did the taxpayer have a shareholder loan outstanding during the year? Yes No If yes, provide details of borrowings and repayments: 10. Rental Income Did the taxpayer have rental income? Yes No If yes, is a statement of rental income attached? Yes No If yes, is a statement of rental income attached? Yes No If yes, is the T slip and other documentation attached? Yes No Nature of RRSP contribution: Contribution to personal RRSP Contribution to spousal RRSP 12. Other I tems Tuition/Education amount for self? Yes No If yes, is the appropriate T slip attached? Yes No If yes, is the appropriate T slip attached? Yes No Are appropriate T slip attached? Yes No Are appropriate details disclosed in an attached schedule? Yes No Are child care expenses claimed? Yes No If yes, is the appropriate documentation attached? Yes No If yes, is the appropriate documentation attached? Yes No Are child care expenses claimed? Yes No | Description of Property | Date Acquired | Date Disposed | Sale Proceeds | Cost | Expenses for | Disposal |
|--|---|------------------------|----------------------|---------------------|---------------------|--------------|----------|
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| If yes, is (are) the appropriate self-employment statement(s) attached? Yes No If an owner/manager, did the taxpayer have a shareholder loan outstanding during the year? If yes, provide details of borrowings and repayments: IO. Rental Income Did the taxpayer have rental income? If yes, is a statement of rental income attached? Yes No II. RRSP Contributions Did the taxpayer make an RRSP contribution during the year? Yes No If yes, is the T slip and other documentation attached? Yes No Nature of RRSP contribution: Contribution to personal RRSP Contribution to spousal RRSP Tuttion/Education amount for self? Yes No If yes, is the appropriate T slip attached? Yes No Tuttion/Education amount claimed on transfer from dependant? If yes, is the appropriate T slip attached? Yes No Are appropriate details disclosed in an attached schedule? Yes No Are child care expenses claimed? Yes No Are redical expenses claimed? Yes No Are medical expenses claimed? Yes No Are medical expenses claimed? Yes No | 9. Self-Employment/ | 'Business Inco | ome | | | | |
| If an owner/manager, did the taxpayer have a shareholder loan outstanding during the year? If yes, provide details of borrowings and repayments: | Was the taxpayer self-employed | d during the year? | | | Ye | S | No |
| If yes, provide details of borrowings and repayments: 10. Rental Income Did the taxpayer have rental income? If yes, is a statement of rental income attached? Yes No If yes, is a statement of rental income attached? Yes No If yes, is the T slip and other documentation attached? Yes No Nature of RRSP contribution: Contribution to personal RRSP Contribution to spousal RRSP Tuttion/Education amount for self? Yes No If yes, is the appropriate T slip attached? Yes No If yes, is the appropriate T slip attached? Yes No Old the taxpayer pay interest on a student loan? Are appropriate details disclosed in an attached schedule? Yes No If yes, is the appropriate documentation attached? Yes No Are child care expenses claimed? Yes No Are medical expenses claimed? Yes No | If yes, is (are) the app | propriate self-employ | ment statement(s) | attached? | Ye | s | No |
| Did the taxpayer have rental income? If yes, is a statement of rental income attached? Yes No If yes, is a statement of rental income attached? Yes No II. RRSP Contributions Did the taxpayer make an RRSP contribution during the year? If yes, is the T slip and other documentation attached? Yes No Nature of RRSP contribution: Contribution to personal RRSP Contribution to spousal RRSP Tuttion/Education amount for self? Yes No If yes, is the appropriate T slip attached? Yes No If yes, is the appropriate T slip attached? Yes No If yes, is the appropriate T slip attached? Yes No If yes, is the appropriate T slip attached? Yes No Are appropriate details disclosed in an attached schedule? Yes No If yes, is the appropriate documentation attached? Yes No Are medical expenses claimed? Yes No Are medical expenses claimed? Yes No | If an owner/manager, did the ta | axpayer have a shar | eholder loan outsta | inding during the y | ear? Ye | S | No |
| Did the taxpayer have rental income? If yes, is a statement of rental income attached? Yes No 11. RRSP Contributions Did the taxpayer make an RRSP contribution during the year? If yes, is the T slip and other documentation attached? Yes No No Nature of RRSP contribution: Contribution to personal RRSP Contribution to spousal RRSP 12. Other Items Tuition/Education amount for self? Yes No If yes, is the appropriate T slip attached? Yes No If yes, is the appropriate T slip attached? Yes No Old the taxpayer pay interest on a student loan? Are appropriate details disclosed in an attached schedule? Yes No If yes, is the appropriate documentation attached? Yes No If yes, is the appropriate details disclosed in an attached schedule? Yes No Are endical expenses claimed? Yes No Are medical expenses claimed? Yes No | If yes, provide details | of borrowings and r | epayments: | | | | |
| If yes, is a statement of rental income attached? 11. RRSP Contributions 11. RRSP Contributions 12. Other Items 12. Other Items 13. If yes, is the appropriate T slip attached? 14. Yes 15. No 16. If yes, is the appropriate T slip attached? 16. If yes, is the appropriate T slip attached? 17. If yes, is the appropriate T slip attached? 18. No 19. If yes, is the appropriate T slip attached? 19. No 19. If yes, is the appropriate T slip attached? 19. No 19. If yes, is the appropriate T slip attached? 10. No 10. If yes, is the appropriate T slip attached? 10. No 11. RRSP Contributions 10. Contribution to spousal RRSP 10. No 11. Yes 10. No 12. Other Items 10. No 12. Other Items 10. No 13. If yes, is the appropriate T slip attached? 14. Yes 15. No 16. Are appropriate details disclosed in an attached schedule? 16. Yes 17. No 18. No 19. Are medical expenses claimed? 19. Yes 10. No 19. Yes 10. No 19. Yes 10. No 19. Yes 10. No 10. Are medical expenses claimed? 10. Yes 10. No 11. RRSP Contributions 16. Yes 17. No 18. No 19. No 19. Yes 10. No 19. Yes 10. No 10. 10. N | 10. Rental Income | | | | | | |
| 11. RRSP Contributions Did the taxpayer make an RRSP contribution during the year? If yes, is the T slip and other documentation attached? Yes No Nature of RRSP contribution: Contribution to personal RRSP Contribution to spousal RRSP Tuition/Education amount for self? Yes No If yes, is the appropriate T slip attached? Yes No If yes, is the appropriate T slip attached? Yes No Old the taxpayer pay interest on a student loan? Are appropriate details disclosed in an attached schedule? Yes No If yes, is the appropriate documentation attached? Yes No Are child care expenses claimed? Yes No Are medical expenses claimed? Yes No Are medical expenses claimed? Yes No | Did the taxpayer have rental inc | come? | | | Ye | S | No |
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| Nature of RRSP contribution: Contribution to personal RRSP Contribution to spousal RRSP Tuition/Education amount for self? Yes No If yes, is the appropriate T slip attached? Yes No If yes, is the appropriate T slip attached? Yes No If yes, is the appropriate T slip attached? Yes No Are appropriate details disclosed in an attached schedule? Yes No If yes, is the appropriate documentation attached? Yes No Are medical expenses claimed? Yes No No Are medical expenses claimed? Yes No | Did the taxpayer make an RRSF | contribution during | the year? | | Ye | S | No |
| Tuition/Education amount for self? If yes, is the appropriate T slip attached? Yes No Tuition/Education amount claimed on transfer from dependant? If yes, is the appropriate T slip attached? Yes No Old the taxpayer pay interest on a student loan? Are appropriate details disclosed in an attached schedule? Yes No If yes, is the appropriate documentation attached? Yes No Are medical expenses claimed? Yes No | If yes, is the T slip and | d other documentati | on attached? | | Ye | S | No |
| Fuition/Education amount for self? If yes, is the appropriate T slip attached? Yes No Fuition/Education amount claimed on transfer from dependant? If yes, is the appropriate T slip attached? Yes No Did the taxpayer pay interest on a student loan? Are appropriate details disclosed in an attached schedule? Yes No Are child care expenses claimed? Yes No If yes, is the appropriate documentation attached? Yes No Are medical expenses claimed? Yes No | Nature of RRSP contribution: | Con | tribution to persona | al RRSP | Contribution to spo | ousal RRSP | |
| If yes, is the appropriate T slip attached? Fuition/Education amount claimed on transfer from dependant? If yes, is the appropriate T slip attached? Yes No Did the taxpayer pay interest on a student loan? Are appropriate details disclosed in an attached schedule? Are child care expenses claimed? Yes No If yes, is the appropriate documentation attached? Yes No Are medical expenses claimed? Yes No | 12. Other Items | | | | | | |
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| If yes, is the appropriate documentation attached? Yes No Are medical expenses claimed? Yes No | Are appropriate details | s disclosed in an atta | ached schedule? | | Ye | S | No |
| Are medical expenses claimed? Yes No | Are child care expenses claimed | 1? | | | Ye | S | No |
| | If yes, is the appropria | ate documentation a | ttached? | | Ye | S | No |
| If yes, is the appropriate documentation attached? Yes No | Are medical expenses claimed? | | | | Ye | S | No |
| | If yes, is the appropria | ate documentation a | ttached? | | Ye | S | No |

| Are charitable donations claimed? | Yes | No |
|--|------------|----------|
| Are donation slips attached? | Yes | No |
| Were any charitable donations made by way of gifting an item in-kind? | Yes | No |
| Were any loans associated with the charitable donation? | Yes | No |
| Are political contributions claimed? | Yes | No |
| Are donation slips attached? | Yes | No |
| Was tax paid by instalments? | Yes | No |
| If yes, has the taxpayer provided information on the amount paid? | Yes | No |
| | | |
| 12 Drier Veer Tey Deturn Information /Correspondence | | |
| 13. Prior Year Tax Return Information/Correspondence | | |
| 13. Prior Year Tax Return Information/Correspondence Is a copy of last year's tax return attached? | Yes | No |
| · | Yes Yes | No No |
| Is a copy of last year's tax return attached? Is a copy of the Notice of Assessment for last year's tax return attached? Are you a new client of the firm? | | |
| Is a copy of last year's tax return attached? Is a copy of the Notice of Assessment for last year's tax return attached? | Yes | No |
| Is a copy of last year's tax return attached? Is a copy of the Notice of Assessment for last year's tax return attached? Are you a new client of the firm? If yes, are tax returns for the last three years (and corresponding Notices of Assessment) attached? | Yes | No No |
| Is a copy of last year's tax return attached? Is a copy of the Notice of Assessment for last year's tax return attached? Are you a new client of the firm? If yes, are tax returns for the last three years (and corresponding Notices of | Yes | No No |