



Address: 201-6981 E Saanich Road

Office Hours: Mon-Fri 9am – 4pm

Contact email: admin@sheilahanson.ca

PERSONAL TAX ORGANIZER

For the year 2019

Please complete this personal tax organizer and attach all applicable slips, receipts, lists, and other supplemental information. Drop off at:

Address: 201-6981 E Saanich Road

Office Hours: Mon-Fri 9am – 4pm

Please note that any missing information, including supporting documents may be subject to our refiling surcharge.

1. Personal Information

Name		SIN	Date of Birth (dd/mm/yy)	Phone	
				Office	Ext.
Taxpayer					
Spouse					
Address				Home:	
				Mobile:	
Email:					

Marital Status:

Married Single Common-law Separated Divorced Widowed

If married or common-law, should you return be filed jointly with your spouse's return?

Yes No

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

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 _____ 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 – T1135

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

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

If yes, please provide us with a list and all relevant details.

5. Change in Personal or Financial Situation During the Year

Date the taxpayer declared bankruptcy during the year: _____

Date the taxpayer refinanced a business with new or revised debt: _____

Date the taxpayer closed a bank account or investment account: _____

6. Dependents

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

Universal child care benefits (UCCB) – Is RC 62 slip attached? Yes No

If the taxpayer is a single parent, is the UCCB designated to a dependent? Yes No

7. General Income/Deductions

- T4 slips – Employment Income? Yes No
- T4A – Commission and self-employment? Yes No
- T4E – Employment insurance? Yes No
- T5007 – Social assistance? Yes No
- Employment income or taxable benefits not shown on the T4 slip? Yes No
- Provide us with the amount paid for union and professional dues as well as the names of the organizations? _____
- List of child care expenses, with receipts, for each child? Yes No
- List of moving expenses paid? Yes No
- List of spousal support payments made or received? Yes No
- List of deductible employment expenses? Yes No
- Is a signed form T2200 attached? Yes No

8. Pension Income

- T4A – Pension, retirement and annuity income? Yes No
- T4A (P) – 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/Deduction

T3 – Income from trust allocation? Yes No

T5 – Investment income? Yes No

T4PS – Income from profit sharing plans? Yes No

T5013 – Partnership income? Yes No

T5008 – Income from securities transactions? Yes No

Did the taxpayer dispose of property or investments (including a principal residence) during the year? If so, provide the following details in a separate list:

Description of Property & Quantity	Date Acquired	Date Disposed of	Sales Proceeds	Cost	Expenses for Disposal

Interest paid to earn investment income _____ Management fees _____ Accounting/legal fees _____

10. Self-Employment/Business Income

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

Has the taxpayer registered to be eligible for Employment Insurance special benefits? Yes No

If an owner/manager, did the taxpayer has a shareholder loan outstanding during the year? Yes No

If yes, provide details of borrowings, repayments, and year-end balance if owner/manager owes the company money:

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/pool registered pension plan (PRPP) Contributions

T-slips for contribution made attached? Yes No

Were there any amounts repaid during the year to a home buyers' plan or a lifelong learning plan? Yes No

13. Other Credits

- T2202 – Tuition/education amount for taxpayer? Yes No
- T2202 – Tuition/education amount claimed on transfer from dependent? Yes No
- Receipt or amount for taxpayer's student loan interest? Yes No
- Receipts/listing of all medical expenses paid in the year for taxpayer, spouse, and dependents? Yes No
- First-time making charitable donations? Yes No
- Receipts for charitable donations or donations made by way of gifting an item in kind? Yes No
- Were any loans associated with the charitable donations? Yes No
- Receipts for political contributions? Yes No
- List of eligible teaching supplies purchased (for teacher and early childhood educators only)? Yes No
- Public transit passes (receipts/details)? Yes No
- Receipts/listing for fitness and arts activity amounts paid for each child? Yes No
- Information pertaining to the purchase of a new home to claim the first time home buyers' amount? Yes No
- Amount of property taxes/rent paid in the year and name of landlord/municipality? Yes No
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14. 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, are tax returns (and corresponding Notice of Assessment) for the last three years attached? Yes No
- If taxpayer claimed a loss carryback in any of the preceding 3 years, are the Notices of Reassessment for those years attached? Yes No
- Is a copy of any other correspondence from the Canada Revenue Agency attached? Yes No
- If you would like your tax refund deposited directly into your account and if you have not already registered for direct deposit, is a void cheque attached? Yes No
- Is your statement of instalments paid for the year attached? Yes No

If you have any questions, please kindly email your question to:

admin@sheilahanson.ca

Once your tax is completed, we will contact you for pick up.