

**TI CLIENT ORGANIZER**  
**For the Year \_\_\_\_\_**

1. Personal Information

	Name	S.I.N.	Date of Birth	Phone (Bus.)
Taxpayer				
Spouse				
Address				Phone (Res.)

Marital Status:    Married    Single    Common-law    Separatec    Divorced    Widowed

If married or common-law, should your tax return be filed jointly with your spouse's return?    Yes    No

2. Elections Canada

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

3. Foreign Reporting

Did the taxpayer own or hold foreign property with a total cost of more than \$100,000C, at any time during the year?    Yes    No

4. Change in Personal or Financial Situation During the Year

Did the taxpayer's marital status change during the yea    Yes    No

Did the taxpayer immigrate to Canada or emigrate from Canada during the ye:    Yes    No

If yes, provide:                      date of entry into Canada \_\_\_\_\_ or date of departure \_\_\_\_\_

Did the taxpayer become deceased during the year? If yes, date of death \_\_\_\_\_    Yes    No

Did the taxpayer become bankrupt during the yea    Yes    No

Did the taxpayer refinance a business with new or revised deb    Yes    No

Did the taxpayer close a bank account or investment account    Yes    No

If yes, provide details: \_\_\_\_\_

## 5. Dependents

Name	Relationship	Date of Birth	S.I.N.	Disabled ?	Income

## 6. Employment Income/Deductions

- Did the taxpayer earn income from employment  
If yes, are T4 slips attached?  Yes  No
- Did the taxpayer receive employment insurance  
If yes, is the T4E slip attached?  Yes  No
- Did the taxpayer receive taxable benefits not shown on the T4 slip?  Yes  No
- Did the taxpayer receive any employment income in the form of commission?  Yes  No
- Did the taxpayer receive a GST rebate?  
If yes, amount received \_\_\_\_\_  Yes  No
- Did the taxpayer pay union/professional dues?  
If yes, provide details \_\_\_\_\_  Yes  No
- Is the taxpayer claiming deductible employment expenses?  
If yes, is a signed T2200 attached?  Yes  No
- Does the taxpayer participate in an employee profit sharing plan  
If yes, T4PS slip attached?  Yes  No

## 7. Pension Income

- Did the taxpayer receive pension income?  
If yes, are the appropriate T slips attached?  Yes  No
- Old Age Security T4(OAS)     CPP/QPP T4A(P)     Pension T4A     RRSP/RPP/RRIF T4RSP/T4RRIF

## 8. Investment Income/Deductions

- Did the taxpayer earn investment income?  
If yes, are the appropriate T slips attached?  Yes  No
- Interest (T5/T600)     Dividends (T5)     Estate/Trust (T3)     Partnership/Tax Shelters (T101/T5013)

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

Description of Property	Date Acquired	Date Disposed	Sale Proceeds	Cost	Expenses of Disposal

Interest paid to earn investment income \_\_\_\_\_

Rental fee on safety deposit box \_\_\_\_\_

Accounting/legal fees \_\_\_\_\_

### 9. 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

### 11. RRSP Contributions

Did the taxpayer make an RRSP contribution during the year  Yes  No  
 If yes, is the Tslip and other documentation attached  Yes  No

Nature of RRSP contribution:  contribution to own RRSP  contribution to spousal RRSP

### 12. Other Items

Tuition/Education amount for self?  Yes  No  
 If yes, is the appropriate Tslip attached?  Yes  No

Tuition/Education amount claimed on transfer from dependant?  Yes  No  
 If yes, is the appropriate Tslip attached?  Yes  No

Did taxpayer pay interest on a student loan  Yes  No  
 Are appropriate details disclosed in an attached schedule  Yes  No

Child care expenses claimed  Yes  No  
 If yes, is the appropriate documentation attached  Yes  No

Medical expenses  Yes  No  
 If yes, is the appropriate documentation attached  Yes  No

Charitable donations:  Yes  No  
 Are donation slips attached?  Yes  No  
 Are any charitable donations made by way of gifting an item in-kind?  Yes  No  
 Any loans associated with the charitable donor  Yes  No

Political contributions:  Yes  No  
 Are donation slips attached?  Yes  No

Tax paid by instalments:  Yes  No  
 If yes, has the taxpayer provided information on the amount paid  Yes  No

13. Prior Year Tax Return Information / Correspondence

Is a copy of last year's tax return attached

Yes

No

Is a copy of the Notice of Assessment for last year's tax return attached

Yes

No

Are you a new client of the firm?

Yes

No

If yes, are tax returns for the last three year:

(and corresponding Notices of Assessment) attached

Yes

No

Other than the Notice of Assessment for your tax return, did you receive any other correspondence from the Canada Revenue Agency?

Yes

No

Is a copy of this correspondence attached

Yes

No