CANADIAN PERSONAL INCOME
TAX ORGANIZER

This is a guide intended to assist you in preparing for income tax filing.

It does not necessarily include everything that may be applicable in your specific situation.

We need a copy of your last filed income tax return (if we did not prepare it) and a recent notice of assessment or reassessment.

ZOE KLEIN & COMPANY
ACCOUNTING SERVICES

1240 BAY STREET,
SUITE 401,
TORONTO, ON M5R 2A7
TEL 416.323.3709
FAX 416.323.3406
EMAIL OFFICE@ZOEKLEIN.CA
WWW.ZOEKLEIN.CA

PERSONAL INFORMATION:

Name: SIN #

Address:

Telephone/Fax number:

Email: Canadian Citizen? Yes ☐ No ☐

Spouse Name: SIN #

Any Change in Marital Status Yes ☐ No ☐

Address:

Telephone/Fax number:

Email: Canadian Citizen? Yes ☐ No ☐

NEW CLIENTS

Your Birth Date Your Spouse's Birth Date

Marital Status

Single ☐ Married ☐ Common-Law ☐ Divorced ☐ Separated ☐ Widowed ☐

New clients please provide copies of the last tax returns filed.

ALL CLIENTS

Do you want to start or change Direct Deposit of refunds into your bank account (income tax **refunds, GST/HST Credits, Canada Child Tax Benefits, or Universal Child Tax Benefits)? If yes,** provide the following information (or attach a VOID cheque to your tax return when completed):

Branch Number

Institution Number

Account Number

Do you want to eFile your return to speed up processing? Yes ☐ No ☐

Did your marital status change during the year? Yes ☐ No ☐

If yes, indicate date of change.

If you are married or living common-law and we are not preparing your spouse's return, please provide your spouse's name, Social Insurance Number, and net income from Line 236 of the spouse's income tax return.

Name: SIN: Net Income:

This is a guide intended to assist you in preparing for income tax filing.

It does not necessarily include everything that may be applicable in your specific situation.

We need a copy of your last filed income tax return (if we did not prepare it) and a recent notice of assessment or reassessment.

ZOE KLEIN & COMPANY
ACCOUNTING SERVICES

1240 BAY STREET,
SUITE 401,
TORONTO, ON M5R 2A7
TEL 416.323.3709
FAX 416.323.3406
EMAIL OFFICE@ZOEKLEIN.CA
WWW.ZOEKLEIN.CA

DEPENDANT INFORMATION

Name				
Birth Date				
Relationship				
Social Insurance				
Net Income				

Did you receive the Canada Child Tax Benefit (CCTB) for any of your children in ? Yes ☐ No ☐

Did you pay childcare expenses in ? Yes ☐ No ☐

If yes, please provide details, including Social Insurance Numbers of individual daycare providers:

Do you authorize Canada Revenue Agency to provide your name, address, and date of birth to Elections Canada for the National Register of Electors? Yes ☐ No ☐

Did you own foreign property at any time with a total cost of more than $100,000 CAD?
Yes ☐ No ☐ If yes, please provide details:

Cost of property	
Type of property	
Location of property	

Did you immigrate to or emigrate from Canada this year? Yes ☐ No ☐
If yes, indicate date of change of residency ....

EMPLOYMENT INSURANCE FOR SELF-EMPLOYED TAXPAYERS

Have you entered into an agreement with the Canada Employment Insurance Commission (through Service Canada) to participate in the new "Employment Insurance (EI) Measure for Self-Employed People"? Yes ☐ No ☐
If yes, please indicate the date of registration. ....

CANADIAN PERSONAL INCOME
TAX ORGANIZER

This is a guide intended to assist you in preparing for income tax filing.

It does not necessarily include everything that may be applicable in your specific situation.

We need a copy of your last filed income tax return (if we did not prepare it) and a recent notice of assessment or reassessment.

ZOE KLEIN & COMPANY
ACCOUNTING SERVICES

1240 BAY STREET,
SUITE 401,
TORONTO, ON M5R 2A7
TEL 416.323.3709
FAX 416.323.3406
EMAIL OFFICE@ZOEKLEIN.CA
WWW.ZOEKLEIN.CA

PURCHASE & SALE OF PRINCIPLE RESIDENCE

Did you or your spouse buy a new home this year? Yes ☐ No ☐

If yes, did you live in another home owned by you or your spouse between Jan. 1 and Dec. 31 ? Yes ☐ No ☐

Did you sell your principle residence during the year? Yes ☐ No ☐

If yes, please provide basic details about the sale (date of original purchase and price, date of sale and price). If you own more than one property or did not live in your principle residence for the entire time you owned it, please discuss this with us at your appointment.

....

....

U.S. CITIZENS

If we did not or will not prepare your U.S. returns, please provide copies. If you require U.S. tax preparation, please include W2, 1099, 1042S or other U.S. tax slips.

Did you have more than $10,000 (USD) in Canadian financial accounts (including bank, RRSP, or investment accounts) at any time during 2010? Yes ☐ No ☐

If yes, Form TD F 90-22.1 must be filed with the U.S. Department of the Treasury by June 30, (received, not postmarked). If you want us to complete this form for you, please provide name and addresses of financial institutions, account numbers and types, and maximum values of each account (in US dollars).

....

....

....

....

Do you have a Canadian RRSP or RRIF? Yes ☐ No ☐

If yes, provide name and addresses of financial institutions, account numbers, and closing value of each account on Dec. 31, (in CDN dollars) for preparation of IRS Form 8891.

....

....

....

....

U.S. citizens who reside in Canada and earn self-employment income can elect not to pay U.S. Social Security Tax on that income by filing Form CPT56 Certificate of Coverage Under the Canada Pension Plan with their U.S. return. This form should be obtained well in advance. Please contact us as soon as possible.

CANADIAN PERSONAL INCOME
TAX ORGANIZER

This is a guide intended to assist you in preparing for income tax filing.

It does not necessarily include everything that may be applicable in your specific situation.

We need a copy of your last filed income tax return (if we did not prepare it) and a recent notice of assessment or reassessment.

ZOE KLEIN & COMPANY
ACCOUNTING SERVICES

1240 BAY STREET,
SUITE 401,
TORONTO, ON M5R 2A7
TEL 416.323.3709
FAX 416.323.3406
EMAIL OFFICE@ZOEKLEIN.CA
WWW.ZOEKLEIN.CA

INCOME & EXPENSES

- ☐ T1204 -Government Service Payments
- ☐ T3 -Trust Income Allocation and Designations
- ☐ T4 -Statement of Remuneration Paid
- ☐ T4A -Pension, Retirement, Annuity and Other Income
- ☐ T4A(OAS) -Old Age Security
- ☐ T4A(P) -Canada Pension Plan
- ☐ T4E -Employment Insurance Benefits
- ☐ T4RSP -RRSP Income
- ☐ T4RIF -RRIF Income
- ☐ T5 -Investment Income
- ☐ T5008 -Securities Transactions
- ☐ T5013 -Partnership Income
- ☐ Foreign Pensions or U.S. Social Security
- ☐ Any other tax slips or income received

DEDUCTIBLE ITEMS

- ☐ Public transit passes -provide receipts
- ☐ Children's Fitness Credit -provide receipts
- ☐ RRSP contribution receipts
- ☐ Charitable donation receipts
- ☐ Medical expenses -provide all receipts and reimbursements from medical plans
- ☐ Investment expenses and carrying charges (e.g. interest, investment counsel fees, safety deposit box fees, etc.)
- ☐ Trades person tools and expenses -provide receipts
- ☐ Tuition fees of more than $100 -obtain T2202A form or receipt from educational institution
- ☐ Student loan interest forms
- ☐ Moving expense receipts, if the move brought you 40 kms closer to workplace or school
- ☐ Union dues, provide receipts
- ☐ Employment expenses -Form T2200 required from employer

ALSO PROVIDE

- ☐ Details of assets sold during the year (stocks and bonds sold outside RRSP, real estate, equipment, autos, etc) with documentation of their cost
- ☐ Income and expenses from rental properties, business or partnership
- ☐ Contributions to federal and provincial political parties
- ☐ Details on alimony/maintenance received or paid
- ☐ Assessment notices and correspondence received from Canada Revenue Agency
- ☐ Receipts for tax paid by installments -total installments paid for 2014:
- ☐ Mailing labels from Canada Revenue Agency

ANYTHING ELSE?

This Personal Tax Organizer is not a complete list. Please provide details regarding any other income or expenses not listed above.

....

....

....

....

....