



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

ACCOUNTING SERVICES

PERSONAL INFORMATION:

Name: _____

Date of Birth: _____ SIN # _____

Address: _____

Telephone/Fax number: _____

Email: _____ Canadian Citizen? Yes No

Spouse Name: _____

Date of Birth: _____ SIN # _____

Marital Status: Single Married Common-Law Divorced Widowed

If a change in status during the year, please provide date: _____

Address: _____

Telephone/Fax number: _____

Email: _____ Canadian Citizen? Yes No

Province of Residence December 31st: _____

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

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 23600 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.



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PURCHASE & SALE OF PRINCIPLE RESIDENCE

Are you a first time home buyer 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 the year of purchase and sale price: _____

Was this your principle residence for the entire time you owned it? Yes No

U.S. CITIZENS

If we did not prepare your previous years' US return, please provide a copy.

Did you have more than \$10,000 (USD) in all your accounts combined, in financial institutions outside the USA, at any time during the year? Yes No

If yes, TALK TO US about filing requirements.

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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
- TS - Investment Income
- TS008 - Securities Transactions
- TS01 - Partnership Income
- Foreign Pensions or U.S. Social Security
- Any other tax slips or income received

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
- If you receive or pay spousal support please provide details
- Assessment notices and correspondence received from Canada Revenue Agency
- Receipts for tax paid by installment during the year.

ANYTHING ELSE?

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

DEDUCTIBLE ITEMS

- Public transit passes – 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

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