



# T1 Individual Tax Return Information Organizer & Checklist

Name: \_\_\_\_\_ SIN: \_\_\_\_\_  
 Address: \_\_\_\_\_ Birthdate: \_\_\_\_\_  
 City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_  
 Phone: \_\_\_\_\_ Cell: \_\_\_\_\_ Marital Status: \_\_\_\_\_  
 Email: \_\_\_\_\_ Can I contact you by email? Yes:  No:

### Elections Canada:

Is the taxpayer a US Citizen? Yes:  No:   
 Is the taxpayer a Canadian Citizen? Yes:  No:   
 If yes to Canadian citizen, does the taxpayer authorize 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:

### Foreign Reporting:

Did the taxpayer own or hold foreign property with a total cost of more than \$100,000 CDN at any time during the year? (i.e. shares in foreign corporations, foreign rental or commercial real estate, etc.) If yes, please provide details. Yes:  No:

### Income: Please Check All Applicable Items

- |  |  |
|--|--|
| <input type="checkbox"/> T4 Employment Income                      | <input type="checkbox"/> T5 Investment Income                                |
| <input type="checkbox"/> T4A Employment Commissions                | <input type="checkbox"/> T3 Trust Income (includes mutual funds)             |
| <input type="checkbox"/> T4A(OAS) Old Age Security                 | <input type="checkbox"/> T5013 Partnership Income                            |
| <input type="checkbox"/> T4A(P) CPP Income                         | <input type="checkbox"/> T5008 Securities Transactions **                    |
| <input type="checkbox"/> T4A Pensions and Other Income             | <input type="checkbox"/> Capital dispositions **                             |
| <input type="checkbox"/> Foreign Pensions (please provide details) | <input type="checkbox"/> Rental Income & Expenses (please provide details)   |
| <input type="checkbox"/> T4RSP RSP Withdrawals                     | <input type="checkbox"/> Business Income & Expenses (please provide details) |
| <input type="checkbox"/> T4RIF RRIF Withdrawals                    | <input type="checkbox"/> Support Payments                                    |
| <input type="checkbox"/> T4E Employment Insurance                  | <input type="checkbox"/> T5007 Social Benefits Payments                      |
| <input type="checkbox"/> RC62 Universal Child Care Benefit         | <input type="checkbox"/> Tips & Gratuities                                   |

\*\* Provide annual statements for all mutual fund/stock investments held outside a RRSP \*\*

[see over]

**Principal Residence Exemption:**

Did you sell your home in 2018? Yes:  No:

Canada Revenue Agency wants to know:

Date of purchase: \_\_\_\_\_

Proceeds of disposition: \_\_\_\_\_

**Deductions: \*\* Please include receipts, statements and any other relevant documentation \*\***

- RRSP Contributions to Feb 28, 2019
- RRSP Home Buyers Plan Repayments
- Professional/Union Dues
- Moving Expenses
- Child Care Expenses
- Support Payments
- Carrying Charges and Investment Expenses
- Employment Expenses
- Employment Insurance Repayments
- Other Deductions

**Non-Refundable Tax Credits:**

- Marital Status Change (provide date)
- Medical Expenses
- Infirm Dependent (provide details below)
- T2202A Tuition/Education Slip
- Charitable Donations
- Disability Tax Credit
- Public Transit Amount (65+)
- First Home Purchased in the past year

**Other:**

- Political Contributions
- Instalment Payments
- Notice of Assessment/Reassessment
- Rent/Property Taxes Paid (include statement or receipts)

**Direct Deposit: \*\*Please include 'VOID' cheques or bank account information for the designated accounts\*\***

Would you like your income tax refund direct deposited, if not already? Yes:  No:

Would you like your Canada Child Benefit direct deposited, if not already? Yes:  No:

**Children and Other Dependants:**

Name	SIN	Relationship	Date of Birth

**\*\*Please list anything else you would like us to know\*\***

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