



Personal Tax Organizer _____ (Year)

Spouse 1 Name: _____

Spouse 2 Name: _____

SIN: _____

SIN: _____

Marital Status: _____

Marital Status: _____

Email: _____

Email: _____

Phone: _____

Phone: _____

Address: _____

Address: _____

Dependant Name

Relationship

DOB

Disability (DTC)

Net Income

Personal Information	Spouse 1		Spouse 2		If yes, send us:
	Yes	No	Yes	No	
Did your marital status change during the year?					Date of Change (MM/DD)
Did your mailing address change during the year?					
Are you a Canadian citizen or permanent resident?					

Elections Canada	Spouse 1		Spouse 2		
	Yes	No	Yes	No	
Do you authorize CRA to provide your name, address and DOB to Elections Canada?					

Foreign Reporting	Spouse 1		Spouse 2		
	Yes	No	Yes	No	
Did you own foreign property with a total cost of more than \$100,000 at any time during the year?					

Foreign Reporting (Cont'd)	Spouse 1		Spouse 2		
	Yes	No	Yes	No	
Did you own an interest in a foreign affiliate at any time during the year?					

Other Information	Spouse 1		Spouse 2		
	Yes	No	Yes	No	
If this is your first filing with EFG?					please provide your previous tax year's T1 General.
Did you immigrate/emigrate from Canada during the year?					If yes, provide date:
Did the taxpayer become deceased during the year?					If yes, provide date:
Does the taxpayer or dependent qualify for the DTC (Disability Tax Credit)?					Is this a first year DTC Claim?
Did you make a Home Buyers Plan (HBP) withdrawal or are you repaying a HBP withdrawal?					Provide year of withdrawal, amount that has to be repaid annually, and how much has been repaid to end of the current Tax year
Did you open an FHSA (First Home Savings Account)?					If yes, provide contribution slips (if applicable)
Did you make a Life Long Learning Plan (LLP) withdrawal or are you repaying a LLP withdrawal?					Provide year of withdrawal, amount that has to be repaid annually, and how much has been repaid to end of the current Tax Year
Did you rent your home from a third party?					If yes, provide landlord's name, months rented, and total rent paid for the year
Do you authorize the CRA to share your full name, email address and Postal Code to BC Transplant for the purpose of being contacted by email about organ and tissue donation?					
Did you sell a property (or properties) within the current Tax Year for which you are claiming a principal residence exemption?					If yes, provide address, year of purchase, how much the property was purchased for and how much it was sold for
Did you sell of a property (including a rental property), or rights to purchase a property within the current Tax Year?					If yes, provide address, year of purchase, how much the property was purchased for and how much it was sold for

Employment Income	Spouse 1		Spouse 2		
	Yes	No	Yes	No	
Employment income					T4
Employee Profit Sharing Plan					T4PS
Do you have any taxable benefits not shown on slips (eg. Tips)					
EI (Employment Insurance) income					T4E
Workers' Compensation Benefits					T5007
Social Assistance Payments					T5007
Foreign Pension Income					If yes, please state Country?
Did you have property rental income					Complete a Statement of Rental Income form for each property

Pension/Retirement Income	Spouse 1		Spouse 2		
	Yes	No	Yes	No	
Pension, Annuity and other income					T4A
OAS (Old Age Security)					T4A(OAS)
CPP (Canada Pension Plan)					T4A(P)
RIF (Retirement Income Fund)					T4RIF
RRSP (Retirement Savings Plan)					T4RSP

Investment Income	Spouse 1		Spouse 2		
	Yes	No	Yes	No	
Trust Income (Interest/Dividends)					T3
Interest/Dividends					T5
Securities Transactions					T5008
Partnership Income					T5013

Employment Deductions	Spouse 1		Spouse 2		
	Yes	No	Yes	No	
Are you paying Union/professional dues?					provide annual summary from union
Did you buy any Trade or Apprenticeship tools?					provide a list with totals & a signed T2200
As an employee of a transport business, do you have meals and lodging expenses?					provide employer signed T2200 and TL2
As an eligible Educator, did you purchase eligible school supplies?					provide a list with totals
Are you claiming deductible employment expenses?					provide employer signed T2200 and <i>complete form T777</i>
Were you self-employed or paid by commission?					Complete form T2125
Do you need us to file your GST Return?					provide access code:

Other Deductions	Spouse 1		Spouse 2		
	Yes	No	Yes	No	
Did you make RRSP contributions?					provide ALL official slips
Do you have Investment Management Fees?					provide annual report
Do you have an Investment loan or LOC?					provide your Dec 31st statement showing interest payments made for the year
Charitable Donations					provide ALL receipts
Medical Expenses					provide all totals for each person (health and dental)
Did you pay for an individual health plan?					provide the annual total of premiums
Political Donations					provide slips
Child care Expenses					provide official receipts
Child Support/Spousal Support					provide details
Tuition Slip(s)					T2202

Other Deductions (Cont'd)	Spouse 1		Spouse 2		
	Yes	No	Yes	No	
Are you transferring tuition fees from child?					
Interest on Student Loan					Provide a statement showing total interest for the year
Moving Expenses					complete form T1M
Have you made any Tax Installment Payments for the current Tax Year?					