

# PERSONAL TAX ORGANIZER

## For the year 2025

Please complete this T1 Organizer before your appointment. Please attach all applicable slips, receipts, lists, and other supplemental information.

### 1. Personal Information

Name		SIN	Date of Birth (dd/mm/yy)	Office Phone	Ext
Taxpayer					
Spouse or Common-Law Partner					
Address				Home	
				Mobile	
Email:					

Marital Status: ☐ Married ☐ Single ☐ Common-law ☐ Separated ☐ Divorced ☐ Widowed

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

If marital status changed during the year, provide date of change (dd/mm/yy): \_\_\_\_\_

### 2. Residence

Province or territory of residence on December 31: \_\_\_\_\_

Did the taxpayer immigrate to Canada or emigrate from Canada during the year? ☐ Yes ☐ No

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

### 3. Elections Canada

Is the taxpayer a Canadian citizen? ☐ Yes ☐ No

If yes, 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

### 4. Foreign Reporting – T1135

Did the taxpayer own or hold foreign property with a total cost between CAN\$100,000 and CAN\$250,000 at any time during the year? If yes, please provide the total foreign income and capital gains earned during the year. ☐ Yes ☐ No

Did the taxpayer own or hold foreign property with a total cost of more than CAN\$250,000 at any time during the year? If yes, please provide a detailed list of all income and capital gains earned during the year. ☐ Yes ☐ No

### 5. Change in Personal or Financial Situation During the Year

Date the taxpayer declared bankruptcy during the year: \_\_\_\_\_

Date the taxpayer refinanced a business with new or revised debt: \_\_\_\_\_

Date the taxpayer closed a bank account or investment account: \_\_\_\_\_

## 6. Dependants

Name	Relationship	Date of Birth	SIN	Physical or Mental Disability?	Income	Child Care Expenses

## 7. General Income/Deductions

- T4 slips – Employment income? ☐ Yes ☐ No
- T4A – Commission and self-employment? ☐ Yes ☐ No
- T4E – Employment insurance? ☐ Yes ☐ No
- T5007 – Social assistance? ☐ Yes ☐ No
- Employment income or taxable benefits not shown on the T4 slip? \_\_\_\_\_
- Amount paid for union and professional dues and organization names? \_\_\_\_\_
- List of child care expenses, with receipts, for each child? ☐ Yes ☐ No
- List of moving expenses paid and for whom? ☐ Yes ☐ No
- List of spousal support payments made or received? ☐ Yes ☐ No
- List of deductible employment expenses? ☐ Yes ☐ No
- Is a signed Form T2200 attached? ☐ Yes ☐ No

## 8. Pension Income

- T4A – Pension, retirement, and annuity income? ☐ Yes ☐ No
- T4A (P) – Canada pension plan benefits? ☐ Yes ☐ No
- T4A (OAS) – Old age security pension slip/foreign pensions? ☐ Yes ☐ No
- T4A-RCA – Retirement compensation arrangements? ☐ Yes ☐ No
- T4RSP – Registered retirement savings plan income? ☐ Yes ☐ No
- T4RIF – Registered Retirement income fund income? ☐ Yes ☐ No
- T4FHSA — First home savings account income? ☐ Yes ☐ No
- Does the taxpayer elect to split eligible pension income with his/her spouse or common-law partner? ☐ Yes ☐ No
- Did the taxpayer receive any amounts for a retirement income security benefit under the *Canadian Forces Members and Veterans Re-establishment and Compensation Act*? If so, provide the required documentation. ☐ Yes ☐ No

## 9. Investment Income/Deductions

T3 – Income from trust allocations?

☐ Yes

☐ No

T5 – Investment income?

☐ Yes

☐ No

T4PS – Income from profit sharing plans?

☐ Yes

☐ No

T5013/T5013(A) – Partnership income?

☐ Yes

☐ No

T5008 – Income from securities transactions?

☐ Yes

☐ No

Sold any crypto-assets?

☐ Yes

☐ No

Did the taxpayer dispose of property or investments during the year (excluding any residences that were designated as a principal residence at any time in the year)? If so, provide the following details in a separate list:

Description of Property and Quantity	Date Acquired	Date Disposed of	Sales Proceeds	Cost	Expenses for Disposal

Did the taxpayer dispose of any property or investments during the year that were designated as a principal residence at any time? If so, provide the following details in a separate list:

Description of Property and Quantity			
Date Acquired			
Date Disposed of			
Sales Proceeds			
Cost			
Expenses for Disposal			
Adjusted cost base at the time of disposition			
If owned prior to 1982, fair market value of property as of December 31, 1981			
If owned prior to 1982, adjusted cost base of property as of December 31, 1981			
Which years was this property designated as a principal residence?			

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

Management fees \_\_\_\_\_

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

## 10. Self-Employment/Business Income

Financial statement(s)/ schedule of revenue and expenses attached? ☐ Yes ☐ No

Has the taxpayer registered to be eligible for Employment Insurance special benefits? ☐ Yes ☐ No

If an owner/a manager, did the taxpayer have a shareholder loan outstanding during the year? ☐ Yes ☐ No

If yes, provide details of borrowings, repayments, and year-end balance if owner/manager owes the company money:

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If the taxpayer used a vehicle for business, are the vehicle expenses and both total and business mileage attached? ☐ Yes ☐ No

If the taxpayer used a portion of his/her home for business, are the home expenses and both total and business square footage attached? ☐ Yes ☐ No

Is a list of all asset additions and disposals (including cars, equipment, etc.) attached? ☐ Yes ☐ No

## 11. Rental Income

If the taxpayer owned rental property, is a statement of rental income attached? ☐ Yes ☐ No

Does the taxpayer also live in the rental property (in which case no CCA should be claimed)? ☐ Yes ☐ No

Did the taxpayer change a rental property to a personal-use property or vice-versa? ☐ Yes ☐ No

If so, please provide details.

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## 12. RRSP/PRPP/FHSA Contributions

T-slip for contributions made attached? ☐ Yes ☐ No

Were any amounts repaid during the year to a home buyers' plan or a lifelong learning plan? ☐ Yes ☐ No

### 13. Other Credits

T2202 – Tuition amount for taxpayer?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
T2202 – Tuition amount claimed on transfer from dependant?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Receipt or amount for taxpayer's student loan interest?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Receipts/listing of all medical expenses paid in the year for taxpayer, spouse, and dependants?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Receipts for charitable donations or donations made by way of gifting an item in kind?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Were any loans associated with the charitable donations?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Receipts for political contributions?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
List of eligible teaching supplies purchased (for teachers and early childhood educators only)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Public transit expenses for travel for Ontario seniors (receipts/details)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Receipts/listing for fitness and arts activity amounts paid for each child (applicable for taxpayers living in Manitoba, Québec, and Yukon)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
First time home buyers amount?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Amount of property taxes/rent paid in the year and name of landlord/municipality?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

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### 14. Prior Year Tax Return Information/Correspondence

Is a copy of the Notice of Assessment for last year's tax return attached?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If new to the firm, are tax returns (and corresponding Notices of Assessment) for the last three years attached?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If taxpayer claimed a loss carryback in any of the preceding three years, are the Notices of Reassessment for those years attached?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Is a copy of any other correspondence from the Canada Revenue Agency attached?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If you would like your tax refund deposited directly into your account and if you have not already registered for direct deposit, is a void cheque or direct deposit form attached?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Is your statement of instalments paid for the year attached?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

### 15. COVID-19 Information

Payment summaries for repayment of COVID-19 benefits?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Did you receive a Canadian Emergency Business Account (CEBA) loan? How much has been repaid? Was any of the loan forgiven?	<hr/>	