



Chartered  
Professional  
Accountant

Help us prepare your return in an efficient and effective manner. Please complete this Organizer, collect ALL your slips, receipts, and documents, and provide one complete tax package to our office.

Please provide one 2021 Personal Tax Organizer per couple.

2021 Personal Tax Organizer			
Client Name:		Spouse Name:	
I/We would like our return to be prepared: <input type="checkbox"/> No Contact/Paperless <input type="checkbox"/> Traditional/Paper Copy			
<b>CONTACT INFO</b>			
<input type="checkbox"/> I/We moved! Please update my/our address			
Physical Address:			
Mailing Address: <input type="checkbox"/> As Above or			
Home/Joint Phone:			
<input type="checkbox"/> I/We have new mobile phone numbers or emails			
Self Mobile:		Email:	
Spouse Mobile:		Email:	
<b>Household</b>			
On December 31, 2021, my/our marital status was:			
Single <input type="checkbox"/>	Common Law <input type="checkbox"/>	Married <input type="checkbox"/>	
Divorced <input type="checkbox"/>	Separated <input type="checkbox"/>	Widowed <input type="checkbox"/>	
My/Our marital status changed in 2021    Yes <input type="checkbox"/> No <input type="checkbox"/> If so, provide date of change (MM/DD)			
I/We welcomed a new dependent to our family <input type="checkbox"/>			
Full Name:		Relationship:	Birthdate (YYYY/MM/DD):
<input type="checkbox"/> My spouse passed in the year or I am the executor of the above noted taxpayer & have completed Worksheet G.			
<b>ANNUAL CONFIRMATIONS</b>			
	Check if yes	SELF	SPOUSE
I am a Canadian Citizen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I authorize the CRA to release my name, address, and date of birth to Elections Canada for the purpose of updating the National Register of Electors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I elect to split eligible pension with my spouse	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am, or may be, eligible for the disability amount (Self or dependent)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I care for a family member who is elderly or has a diversability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I have a Home Buyers Plan or Lifelong Learning Plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I purchased my first home in 2021	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If so, provide purchase price _____ and date of purchase _____			
I was a volunteer firefighter or Search & Rescue volunteer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I had/owned property outside Canada in 2021 and have completed Worksheet F	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b>INCOME</b>				
While we can obtain most slips directly from CRA, please indicate what slips we should expect				
We appreciate you submitting the slips you have received as CRA's system is not always up to date				
<b>Employment &amp; Retirement Slips</b>				
		Check if yes and provide number of slips	SELF	SPOUSE
<b>T4</b>	Employment Income	<input type="checkbox"/> _____	<input type="checkbox"/> _____	
<b>T4A</b>	Pension, retirement, annuity and COVID benefits	<input type="checkbox"/> _____	<input type="checkbox"/> _____	
<b>T4A(P)</b>	Canada Pension Plan benefits	<input type="checkbox"/>	<input type="checkbox"/>	
<b>T4A (OAS)</b>	Old Age Security	<input type="checkbox"/>	<input type="checkbox"/>	
<b>T4E</b>	Employment Insurance and other benefits (including COVID benefits)	<input type="checkbox"/> _____	<input type="checkbox"/> _____	
<b>T4RSP</b>	Registered Retirement Savings Fund withdrawals	<input type="checkbox"/> _____	<input type="checkbox"/> _____	
<b>T4RIF</b>	Statement of Income from a Registered Retirement Income Fund	<input type="checkbox"/> _____	<input type="checkbox"/> _____	
<b>T5007</b>	Statement of Benefits (WCB, social assistance)	<input type="checkbox"/> _____	<input type="checkbox"/> _____	
<b>Investment Slips</b>				
		Check if yes and provide number of slips	SELF	SPOUSE
<b>T5</b>	Statement of Investment Income	<input type="checkbox"/> _____	<input type="checkbox"/> _____	
<b>T5008</b>	Statement of Securities Transactions	<input type="checkbox"/> _____	<input type="checkbox"/> _____	
<b>T5013</b>	Partnership Income	<input type="checkbox"/> _____	<input type="checkbox"/> _____	
<b>T3</b>	Trust income and distributions	<input type="checkbox"/> _____	<input type="checkbox"/> _____	
Slip(s) not listed above (specify):				
<b>Income not reported on a slip (Please provide amount)</b>			SELF	SPOUSE
Gratuities/Casual Earnings			\$ _____	\$ _____
Spousal Support received			\$ _____	\$ _____
<b>Other sources of earnings</b>				
		Check if yes	SELF	SPOUSE
I am/We are Self-Employed and have completed Worksheet A		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am/We have rental property(ies) and have completed Worksheet B		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>DEDUCTIONS &amp; CREDITS</b>				
To claim the following deductions and credits <b>we require supporting documents</b> such as slips, receipts or detailed listings in order to verify eligibility for these claims. Please include them for us.				
Check if yes				
RRSP contributions	<input type="checkbox"/>	Interest paid for investment purposes	<input type="checkbox"/>	
Union or professional dues	<input type="checkbox"/>	Investment management fees	<input type="checkbox"/>	
Medical receipts and/or medical travel	<input type="checkbox"/>	Moving expenses	<input type="checkbox"/>	
Donation receipts	<input type="checkbox"/>	Home accessibility/renovation expenses	<input type="checkbox"/>	
Political contributions	<input type="checkbox"/>			
Child care expenses	<input type="checkbox"/>	Other (specify):	<input type="checkbox"/>	
Spousal support paid	<input type="checkbox"/>			
Tax installments paid to CRA	<input type="checkbox"/>			
Interest on student loans	<input type="checkbox"/>			

