

Douglas A. Kasper Professional Corporation  
Chartered Professional Accountant

## Personal Tax Organizer

For the year 2023

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/yyyy)	Phone		
			Office	Home	Mobile
Taxpayer					
Spouse or Common-Law					
Address					
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/yyyy):  
\_\_\_\_\_
- Was the taxpayer born in the U.S. or is he/she a U.S. citizen  Yes  No

### 2 Residence

- Province or territory of residence on December 31: \_\_\_\_\_
- Did the taxpayer immigrate to Canada during the year?  Yes  No
- If yes, provide Date of Entry to Canada (dd/mm/yyyy): \_\_\_\_\_
- Did the taxpayer emigrate from Canada during the year?  Yes  No
- If yes, provide Date of Departure (dd/mm/yyyy): \_\_\_\_\_

## 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?  Yes  No
- If yes, please provide the total foreign income and capital gains earned during the year:

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

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## 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	Physically or Mentally Handicapped?	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:

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- Provide us with the amount paid for union and professional dues as well as the names of the organizations:

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- List of childcare 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?  Yes  No

- If so, provide the required documentation:

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## 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 – 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)  Yes  No
- 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 principal residence at any time in the year?  Yes  No

- 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:

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- Management fees:

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- Accounting/legal fees:

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## 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 business mileage attached?  Yes  No
- If the taxpayer used a portion of his/her home for business, are the home expenses and both total 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?  Yes  No
- T2202 – Tuition amount claimed or transfer from dependant?  Yes  No
- Receipt or amount for taxpayer's student loan interest?  Yes  No
- Receipts/listing of all medical expenses paid in the year for taxpayer, spouse, and dependants?  Yes  No
- Receipts for charitable donations or donations made by way of gifting an item in kind?  Yes  No

- Were any loans associated with the charitable donations? Yes No
- Receipts for political contributions? Yes No
- List of eligible teaching supplies purchased (for teachers and early childhood educators only)? Yes No
- Public Transit expenses for travel for Ontario Seniors (receipts/details)? Yes No
- Receipts/listing for fitness and arts activity amounts paid for each child (applicable for taxpayers living in Manitoba, Quebec, and Yukon)? Yes No
- Information pertaining to the purchase of a new home to claim the first time home buyers amount? Yes No

## 14 Prior Year Tax Return Information/Correspondence

- Do we have access to your CRA account on-line? Yes No
- If we do not have online access to your CRA account, have you attached a copy of prior years notice of assessment (if available) Yes No
- If you want direct deposit for tax refunds, GST rebates and climate rebates then direct deposit can only be done if you log into your personal account and add CRA for direct deposit. Have you done this? Yes No

## 15 COVID-19 Information

- Payment summaries for repayment of COVID-19 benefits? Yes No