

2016 Personal Tax Organizer for Healthcare Professionals

New for 2017!

Please complete this T1 organizer. Attach (or upload) all applicable slips, lists, and other supplemental information

1. Personal Information

Name		SIN	Date of Birth (dd/mm/yy)	Phone	
You					
Your Spouse					
Address				Home	()
				Cell	()
Email				Preferred:	<input type="checkbox"/> Home <input type="checkbox"/> Cell

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 you immigrate to Canada or emigrate from Canada during the year? Yes No

If yes, provide date of entry into Canada _____ or the date of departure _____

Are you a U.S. resident? Yes No

If so, do you need assistance in U.S. taxation? Yes No

3. Elections Canada

Are you a Canadian Citizen? Yes No

If yes, you authorize the CRA to provide your name, address, and date of birth to Elections Canada to update his/her information on the National Register of Electors Yes No

You authorize the registration for the CRA online mail service Yes No

4. Foreign Reporting – T1135

Did you own or hold foreign property with a total cost between CDN \$100,000 and CDN \$250,000 at any time during the year? If yes, please provide a list and relevant details.

Yes No

Did you own or hold foreign property with a total cost of more than CDN \$250,000 at any time during the year? If yes, please provide a list and relevant details.

Yes No

5. Change in Personal or Financial Situation During the Year

Date that you declared bankruptcy during the year

Date that you refinanced a business with new or revised debt

Date that you closed a bank account or investment account

6. Dependents

Name	Relationships	Date of Birth (dd/mm/yy)	SIN	Childcare Expense

Universal Childcare Benefit (UCCB) – Is RC62 slip attached?

Yes No

If you are a single parent, is the UCCB designated to a dependent?

Yes No

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 childcare expenses, with receipts, for each child?

Yes No

General Income/Deductions Continued

- List of moving expenses paid in the year? Yes No
- List of support payments made or received? Yes No
- List of deductible employment expenses? Yes No
- Is a signed Form T2200 attached? Yes No
- Did you receive workers' compensation, social assistance payments or net federal supplements? If yes please present your T5007 slips. Yes No

8. Pension Income

- T4A – Pension, retirement and annuity income? Yes No
- T4AP – 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
- Do you elect to split eligible pension income with your spouse or common-law partner? Yes No

9. Investment Income

- 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
- Did you sell, gift or donate property or investments during the year? If so, provide trading summary. Yes No

Interest paid to earn investment income _____ Management fees _____ Accounting/legal fees _____

- Did you sell your PRINCIPAL RESIDENCE in 2016? You are now REQUIRED to report the sale to CRA. It continues to be tax free if it is reported properly on your return. The purchase price, selling price, date of sale as well as the legal documents are needed. Yes No

10. Self-Employment/Business Income

- Financial statement(s) / schedule of revenue and expenses attached? Yes No
- Have you registered for Employment Insurance special benefits? Yes No
- If you used your vehicle(s) for business, are the vehicle expenses as well as the total and business kilometers driven included? If not, please provide. Yes No
- If you used a portion of your home for business, are the home expenses, total and business square footage attached? Yes No
- If you purchased, sold or donated assets (including cars, equipment, etc.) attach receipts. Yes No
- Does your business earn income from internet webpages and websites? If yes please provide the number of internet webpages and websites of the business, the main webpages and website addresses and the percentage of your gross income generated from web pages and websites. Yes No

11. Rental Income

- If you 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

12. RRSP Contributions

- T-slip for contributions made attached? Yes No
- Were any amounts repaid during the year to a home buyer's plan or a lifelong learning plan? Yes No

13. Other Credits

- T2202 – Tuition/education amount for you? Yes No
- T2202 – Tuition/education amount claimed on transfer from dependent? Yes No
- Receipt or amount for your student loan interest? Yes No
- Receipts/listing of all medical expenses, you that you paid during the year spouse and dependents? Yes No
- First time making charitable donations? Yes No
- Receipts for charitable donations or donations made by way of gifting an item in kind? Yes No
- Receipts for political contributions? Yes No
- Public transit passes (receipts/details)? Yes No

Other Credits Continued

- Receipts/listing for fitness and extracurricular activity amounts paid for each child? Yes No
- Statement for new home to claim the home buyer's amount? Yes No
- Amount of property taxes/rent paid in the year? Please enter either the name of landlord or municipality to whom payment was made or both. _____ Yes No
- If you are eligible to claim the disability amount, did you receive part-time attendant care in a retirement home? Please provide the form T2201 and proof of payment that shows the actual amount paid for attendant care. Yes No
- Are you a first time homebuyer or have you purchased a home after you or your spouse have not owned one for the 4 preceding years? If so, you may qualify for credits and rebates. Please provide a copy of your property purchase documents. Yes No
- Teacher and Early Childhood Educator School Supply Tax Credit** – please provide certification from your employer as well as receipts for the supplies. Yes No
- Healthy Homes Renovation Tax Credit** to help make the home of seniors 65 years or older, safer, and more accessible. Please provide any receipts that may apply. Yes No

14. Prior Year Tax Return Information/Correspondence

Please provide a copy of all Notice(s) of (Re) Assessment for last year's tax return.

If you are a new client, please provide tax returns and corresponding Notices of (Re) Assessments for the last three years.

- Was a loss carryback claimed in any of the preceding three years? Yes No
- If you would like your tax refund deposited directly into your account, please provide a void cheque. Yes No
- Please provide your statement of income tax instalments from Canadian Revenue Agency if you have one. Yes No

Please send your 2016 tax package along with this organizer using one of the following methods

- 1) Courier Package to Tucker Professional Corporation
2-146 West Beaver Creek Road
Richmond Hill, ON L4B 1C2
- 2) Upload to your secure Client Portal

A Note about Text Messages:

Information supplied by text message(s) does not lend itself to proper storage/retention protocols, so please refrain from text messages to provide information relating to the preparation of your income tax return(s). Thank you.