CLEAR FORM

New for 2019!

2018 Personal Tax Organizer
For Healthcare Professionals

Please complete this T1 organizer. Then, upload (or attach) this organizer as well as all applicable slips, lists, and other supplemental information to your client portal, in a **black and white** (no colour please)**, low resolution formatted PDF**.

1. Personal Information

	Name	SIN	Date of Birth (yyyy/mm/dd)	Phone
You:				
Spouse:				
Address:				
Email:				Prefer: ☐ Text ☐ Email

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

If married or common-law, would you like us to prepare your spouse's return? ☐Yes ☐No

If marital status changed during the year, provide date of change (yyyy/mm/dd): ________________

2. Your Residency Status for Canadian Income Tax Purposes

Province or territory of residence on December 31, 2018? ________________

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

If yes, provide date of entry into Canada (yyyy/mm/dd) ________________ or the date of departure ________________

Are you a U.S. citizen? ☐Yes ☐No

If so, can we assist with your U.S. tax matters? ☐Yes ☐No

3. Elections Canada Authorization

Are you a Canadian Citizen? ☐Yes ☐No

If yes, have you authorized the CRA to provide your name, address, and date of birth to Elections Canada to update your information on the National Register of Electors? ☐Yes ☐No

Would you like us to register you for Canada Revenue Agency's online mail service? ☐Yes ☐No

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4. Reporting Your Foreign Investments – 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 Your Personal or Financial Situation During the Year

Did you declare bankruptcy during the year? Provide date (yyyy/mm/dd) ____________________

Refinanced debts (loans, lines of credit, mortgage(s))? Provide date (yyyy/mm/dd) ____________________

Bank account or investment accounts opened or closed? Provide date (yyyy/mm/dd) ____________________
Provide account number(s)

6. Dependents

Name	Relationships	Date of Birth (yyyy/mm/dd)	SIN

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

Union and Professional Dues: Please provide a list of amounts paid and organization names.

Childcare Expenses: Please provide a list of expenses, with receipts, for each child. ☐Yes ☐No

Moving Expenses: Please provide a list of expenses paid in the year. ☐Yes ☐No

Support Payments: Please provide a list of payments made or received (i.e. alimony or support payments). ☐Yes ☐No

*If you answered "**yes**" to any of the previous questions – please **upload a copy** of the document(s) to your **Client Portal**.*

7. General Income / Deductions (Continued)

Employment Expenses: Please provide a list of employment expenses.	☐Yes	☐No
Please provide a Form T2200 (see attached) signed by your employer, if applicable.	☐Yes	☐No
Did you receive workers' compensation, social assistance payments or net federal supplements? If yes, please provide your T5007 slips.	☐Yes	☐No

*If you answered "**yes**" to any of the previous questions – please **upload a copy** of the document(s) to your **Client Portal**.*

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

*If you answered "**yes**" to any of the previous questions – please **upload a copy** of the document(s) to your **Client Portal**.*

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 2018? You are now required to report the sale. Details to be reported include: purchase price, selling price, date of sale as well as the legal documents are needed.	☐Yes	☐No

*If you answered "**yes**" to any of the previous questions – please **upload a copy** of the document(s) to your **Client Portal**.*

Did you (or your spouse, if applicable) 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 monthly investment (or broker) statements for each investment account.

Description of Property & Quantity	Date Acquired (yyyy/mm/dd)	Date Disposed of (yyyy/mm/dd)	Sales Proceeds	Cost	Expenses for Disposal
			$	$	
			$	$	
			$	$	
			$	$	

Did you (or your spouse, if applicable) dispose of any properties during the year that were could be designated as a principal residence? If so, provide the following details in a separate list:

	Property 1	Property 2	Property 3
Address of Property Sold			
Date you purchased (or changed its use) of the property (yyyy/mm/dd)			
Date Disposed of (or its use changed (yyyy/mm/dd)			
Amount sold for?	$	$	$
Amount paid?	$	$	$
Expenses incurred to sell (legal, real estate commission, repairs)			
Adjusted cost base at the time of disposition			
If you owned prior to 1982, what was its fair market value at December 31, 1981?			
If owned before 1982, what was the cost of the property at December 31, 1981?			
Which years was this property designated as a principal residence?			

10. Self-Employment / Business Income

Financial statement(s) or 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 (work), are all 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 (work), are the home expenses, total and business square footage attached?	☐ Yes	☐ No
If you purchased, sold or donated assets (including cars, equipment, etc.) please attach receipts.	☐ Yes	☐ No
Does your business (practice) earn income from internet webpages and websites? If yes, please provide the number of internet webpages and websites, 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, have you attached the rent collected and expenses paid?	☐ Yes	☐ No
Do you also live in the rental property?	☐ Yes	☐ No

12. RRSP Contributions

Is a RRSP receipt, for contributions made, attached?	☐ Yes	☐ No
Were any amounts repaid during the year to a home buyer's plan or a lifelong learning plan? Please provide the amount repaid.	☐ 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 of your student loan interest charged during the year?	☐ Yes	☐ No
Receipts/listing of all medical expenses **paid** during the year for you, your spouse and dependents?	☐ Yes	☐ No
Receipts for charitable donations, including donations made by way of gifting an item in kind, paid during the year?	☐ Yes	☐ No
Receipts for political contributions?	☐ Yes	☐ No
Receipts for transit passes to claim the Ontario seniors' public transit tax credit?	☐ Yes	☐ No

*If you answered "**yes**" to any of the previous questions – please **upload a copy** of the document(s) to your **Client Portal**.*

13. Other Credits (Continued)

Lawyer's Statement of Adjustments for new home purchase to claim home buyer's amount?	☐ Yes	☐ No
Amount of property taxes/rent paid in the year? Please provide 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 received from your lawyer.	☐ 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, (Re)Assessment Notices and Correspondence

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

If you are a new client of TPC, please provide your 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

*If you answered "**yes**" to any of the previous questions – please **upload a copy** of the document(s) to your **Client Portal**.*

Please send your **2018 tax package** including **this organizer** using one of the following methods:

1) **Upload** to your secure **Client Portal**

OR

2) **Courier Packages** must be sent to our **Head Office** at:
Tucker Professional Corporation
2-146 West Beaver Creek Road
Richmond Hill, ON L4B 1C2