

FPLS Accounting Group

CHARTERED PROFESSIONAL ACCOUNTANTS

Personal Tax Organizer – 2020 Tax Year

Name: _____

S.I.N.: _____		Date of birth: _____			
Address: _____		Email: _____			
Home: _____	Work: _____	Other: _____			
Marital status: _____ (married, living common-law, widowed, divorced, separated, or single)					
Spouse/Common-law partner: _____		Date of birth: _____			
S.I.N.: _____					
Dependent's Name	S.I.N.	Relationship	Date of Birth	Disability, if any	Net Income
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

<u>STANDARD QUESTIONS FOR ALL TAXPAYERS:</u>	YES	NO	IF YOU HAVE ANSWERED YES – SEND US:
Are you a Canadian Citizen?			
If you are a Canadian citizen, do you authorize the CRA to give your name, address, date of birth, and citizenship to Elections Canada for the National Register of Electors?			
Have you spent more than 30 days within the U.S in any of the last three years?			How many days were spent within the U.S. in each of 2017, 2018, 2019 (breakdown per year).
Did you own or hold foreign property at any time in 2020 with a total cost of more than CAN \$100,000? Example: This includes bank accounts, shares in non-resident companies, foreign real estate (except for vacation property owned strictly for personal use), and loans to a person not a resident in Canada. This DOES NOT relate to assets held in your RRSP, RRIF, or TFSA.			Need the details related to the foreign property owned.
<u>INCOME – DID YOU RECEIVE:</u>			
Employment or commission income (T4), estate or trust payments (T3), dividends or interest (T3/T5), Old Age Security (T4A(OAS)), Canada Pension Plan (T4A(P), or Employment Insurance (T4E) benefits.			The related T-Slip
Pension income			T4RSP/T4RIF/T4A slips
Do you want to split pension income with spouse?			
Income from tax shelters/limited partnerships/REITs?			Details, T5013/T3 slips
Income from sources outside Canada			Slips or details where no slips available
Proceeds from the sale of your principal residence			Year of acquisition, proceeds of disposition, and description of property
Proceeds from the sale of any stocks, bonds, real estate (other than a principal residence - see previous point),			Description of assets, year of acquisition, date and proceeds of disposition, adjusted cost base and selling costs, and your annual trading summary
Rental/business/professional/farming/fishing income			Details of income and expenses, capital assets purchased during the 2020 year (description, date of purchase, and cost).
Are you registered for GST/HST?			GST Number
Any income not listed above (e.g. social assistance, Workers' Compensation, etc.)			Slips or details where no slips available

DEDUCTIONS/CREDITS – FOR THIS TAX YEAR, DID YOU:	YES	NO	IF YOU HAVE ANSWERED YES – SEND US:
Contribute to or transfer eligible income to an RRSP/PRPP			Tax receipts
Pay interest on your student loan in the current year, or in prior years and have not claimed it			Interest statements for qualifying loans from the federal or provincial/territorial government
Pay union or professional dues			Tax receipts
Make an investment in a labour-sponsored venture fund			Provincial tax receipt - T5006
Incur moving expenses to move at least 40 kms closer to work or school			Details and receipts
Pay or receive alimony or maintenance support pursuant to a court order or written agreement. Please provide a copy of the agreement, and indicate the date of agreement.			To/from whom and SIN: _____ Address: _____ Amount: \$ _____
Pay child care expenses so you could work or attend school (including summer camp)			To whom and SIN/BN: _____ Address: _____ Amount: \$ _____ If boarding school or camp, # of weeks: _____
Incur expenses to earn investment income			Details and receipts
Make charitable or political donations			Tax receipts
Did you Or your spouse or dependent child become disabled in 2020			Form T2201 completed by your physician
Pay for medical or dental expenses for which you were not reimbursed or for premiums for extended medical or dental coverage, including out of country medical coverage			Expenses and the receipts.
Invest in any tax shelters or receive any reporting regarding any prior years			Details, T5003, etc.
Incur any board/lodging costs as a transport employee			Form TL2 completed by your Employer
Incur any expenses to maintain an office in your home as required by your employer			Form T2200 completed by your employer. Details of expenses, including GST/HST paid
Incur any automotive or business expenses as an employee			Form T2200 completed by your employer Auto log; expenses, including GST/HST paid
Buy any tradesperson's or apprentice mechanic's tools			Receipts
Did you Or your spouse or any of your dependent children attend university or college			Form T2202 TL11A/TL11C slip signed by the student
Support an infirm dependent spouse, an infirm dependent minor child, or any infirm dependent adult relatives			Details, including the income of the person receiving the care.
Pay any foreign taxes			Details
Purchase a "first home" or one for a related disabled person			Details
Incur expenses to make a home more accessible			Details
Purchase school supplies as an eligible educator			Details
OTHER – DID YOU:	YES	NO	IF YOU HAVE ANSWERED YES – SEND US:
Pay any federal tax instalments for the taxation year other than amounts deducted at source			Amount: \$ _____ Provide receipts and latest statement of account
Withdraw funds from your RRSP during the year or in a prior year for the Home Buyers' Plan or Lifelong Learning Plan			Details
Have a spouse or dependent with income and FPLS is not preparing the return			Details of spouse/dependent's net income from line 236 of T1 return
For Ontario and Manitoba Residents: Pay property taxes or rent during the year			Details of amount paid and (1) if property taxes, the name of the municipality or (2) if rent, the name of the landlord
For Manitoba, Quebec, and Yukon Residents: Incur expenses to enroll children under 16 years old in a prescribed program(s) of physical, artistic, cultural, recreational, or developmental activity			Official receipts and details