



2009 PERSONAL TAX ORGANIZER

PERSONAL INFORMATION

Name _____

Address _____ SIN _____ - _____ - _____

_____ Date of birth (MM/DD/YY) _____ / _____ / _____

Email _____ Telephone (_____) _____ - _____

Prov. of residence on Dec. 31, 2009 _____ Marital status _____

If change of marital status in 2009 (MM/DD/YY): Date of marriage/union _____ Date of separation/divorce _____

SPOUSE OR COMMON LAW SPOUSE INFORMATION

Spouse's name _____ SIN _____ - _____ - _____

Spouse's birth date (MM/DD/YY) _____

If we are not preparing your spouse's tax return, please indicate his/her:

a) net income (line 236 of the T1 return) \$ _____

b) universal child care benefit included in net income \$ _____ or deducted from net income \$ _____

c) RDSP income included in net income \$ _____ or deducted from net income \$ _____

DEPENDANT CHILDREN AND OTHER DEPENDANTS *(include children over 18 at college/university)*

Name	SIN	Relationship	Net Income In 2009	Date of Birth (MM/DD/YY)	If over 19 & disabled? Nature of infirmity
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

REMINDERS!!!

- Please attach a copy of your 2008 Notice of (Re)Assessment
- If this is the first year we are preparing your tax return, please attach copies of your previous three years' tax returns and Notices of (Re)Assessment
- If you have paid any instalments please attach copies of your latest statement of account from the Canada Revenue Agency

SOURCES OF INCOME

Employment Income

- ___ Salaries, wages, commissions, directors fees, executors fees, profit sharing, *attach T4, T4PS slips*
- ___ Other employment income (tips, training allowances, personal use of company automobile)
- ___ Allowable employment expenses (travel expenses, meal expenses, telephone, lodging, automobile expenses)
(In order to claim employment expenses, you must have your employer complete form T2200)

Pension Income

- ___ Old Age Security Pension, *attach T4A (OAS) slip*
- ___ Canada Pension Plan or Quebec Pension Plan benefits, *attach T4A (P) slip*
- ___ Other pension or superannuation benefits including foreign pensions, *attach T4A, T4RSP and T4RIF slips*

Do you wish to split your eligible pension income with your spouse? Y or N

Who qualifies?

- *Both taxpayers must be married or in a common-law partnership with each other in the year*
- *Both must be resident in Canada on December 31, or*
 - *If deceased in the year, resident in Canada on the date of death; or*
 - *If bankrupt in the year, resident in Canada on December 31 of the calendar year in which the tax year (pre- or post-bankruptcy) ends.*

What is eligible pension income?

- *Eligible pension income is taxable part of annuity payments from a superannuation or pension fund or plan, and*
- *If received as a result of the death of a spouse/common law partner, or if the pensioner is age 65 or older at the end of the year:*
 - *Annuity and registered retirement income fund (RRIF) payments, and*
 - *Registered retirement savings plan (RRSP) annuity payments*
- ***NOTE: Old age security (OAS) and Canada or Quebec Pension Plan (CPP/QPP) payments DO NOT qualify***

Investment Income

- ___ Taxable dividends from taxable Canadian corporations, *attach T5 slips*
- ___ Interest and other investment income, *attach T5, T3, T600, T600C, T5013, T5008 slips where available, provide details and amounts where no slip is available*
- ___ Please provide a list of all the Canada Savings Bonds you **owned** at the end of 2009 properly accrued
- ___ Securities sold, *please attach details of name of the corporation, number of shares sold, date sold, date acquired, gross proceeds of sale, expenses of sale, original cost, valuation day value if owned prior to 1972, adjustments to cost base (tax-free dividends, etc.), transaction slips/brokers' statements*
- ___ Other assets sold (real estate, gold, bonds, coins, principal residence, foreign currency), *please attach details of description of asset, gross proceeds of sale, expenses of sale, original cost, valuation date value if owned prior to 1972*

Income From Other Sources

- ___ Rental property, *attach details of income, expenses, purchases, sales (gross rents, interest expense, property tax, repairs and maintenance, insurance, advertising, management and administration fees, office expenses, utilities, travel)*
- ___ Alimony, separation or child support payments, *provide a copy of the agreement and **all** subsequent amendments or alterations*
- ___ Employment Insurance benefits, *attach T4E slip*
- ___ Universal Child Care Benefit, *attach RC62 slip*
- ___ Other, *provide details and amounts*

Self-Employment Income - Please include a schedule showing the calculation of income for the year

- ___ Farm income
- ___ Business income
- ___ Professional income
- ___ Commission income
- ___ Fishing income

DEDUCTIONS FROM INCOME

Deductions from Total Income

- ___ Registered Retirement Savings Plan (RRSP) contributions, *attach receipts*
- ___ RRSP Home Buyers Plan, *attach details of all withdrawals from an RRSP under the Home Buyer's Plan by you or your spouse, of which you were the original contributor (Form T1036). If you have previously taken out a Home Buyer's loan, please provide details of repayments of the loan made during the year*
- ___ Tax shelter deductions, renounced resource expenditures, *attach T101, T5013A slips*
- ___ Annual union, professional dues, *attach receipts*
- ___ Alimony, separation or child support payments: *provide a copy of the agreement and **all** subsequent amendments or alterations and the social insurance number of the former spouse, and proof of payment*
- ___ Legal expenses incurred with respect to the support payments, *attach information*
- ___ Moving expenses (must move at least 40kms closer to new workplace/educational institution), *attach information*
- ___ Safety deposit box, *attach receipts*
- ___ Accounting fees, investment counsel and management, *attach receipts*
- ___ Childcare expenses (childcare expenses that were required to allow you to work). *Please provide the following details for each child: name, address and SIN (where applicable) of the person, organization, boarding school or camp to whom payments were made, the amount paid, and the number of weeks stayed*
- ___ Interest expenses (interest on loans used for investment purposes or for the purpose of earning income is generally deductible). *Please provide the following details: name and address of lender, purpose of loan, amount of original loan, amount owing at December 31, 2009, and the interest paid during the year*
- ___ Other deductions, *provide details and amounts*

Other Tax Credits

- ___ Disability deduction (*totally blind at any time during the year or confined to a bed or wheelchair throughout any 12 month period ending in the year*)
Specify if the claim is for self, spouse or other dependant _____
If you have not previously claimed a disability deduction, or if the period for which the disability was previously certified ended in 1996, you need to obtain and have your physician complete form T2201.
- ___ Medical expenses for any 12 month period ending in the year (if not reimbursed, include private health plan premiums, Blue Cross, travel health insurance), *attach receipts*
- ___ Charitable donations, *attach receipts*
- ___ Tuition fees, *attach receipts*
- ___ Student loans (interest paid on Canada or Provincial student loans during the year), *attach information*
- ___ Education and textbook deduction for self, *attach form T2202 from educational institution*

- ___ Tuition fees and education deduction transferred from student, *attach receipts, form T2202 with back completed and signed by student, and copy of student's T1 personal tax return or information to prepare return*
- ___ Gifts to Canada or a province, *attach receipts*
- ___ Political contributions, *attach receipts*
- ___ Adoption expenses, *attach receipts*
- ___ Public transit passes, *attach monthly passes purchased and receipts*
- ___ Children's Fitness Tax Credit (for children under age 16, minimum 8 weeks with one session per week, supervised, activities must have significant amount of physical activity contributing to "cardio respiratory endurance" plus one or more of muscular strength, muscular endurance, flexibility, or balance; disabled under age 18), *attach receipts*
- ___ Amount for children born in 1992 or later (*How many children born in 1992 or later?*) _____
- ___ Home Buyer's Amount (only homes purchased after January 27, 2009 and for which you and your spouse did not own a home since 2004 qualify), *attach proof of purchase such as lawyer's Statement of Adjustments*
- ___ Home Renovation Tax Credit (for qualifying home renovation expenditures made in the period January 28, 2009 to January 31, 2010, work must be completed before February 1, 2010, supplies purchased but not installed by February 1, 2010 qualify, residence must be in Canada, minimum expenditures \$1,000, maximum expenditures \$10,000), *attach receipts*

Instalments

- ___ Amount of tax paid by instalments for 2009, *attach a copy of most recent Statement of Account* \$ _____

Foreign Reporting

- ___ Received funds from a foreign trust after 1995, or have ever transferred or loaned property to a foreign trust, *provide details*
- ___ Own over 1% of a foreign corporation (including US LLC or LLP) or trust and together with related parties own over 10%, *provide details*
- ___ U.S. Citizen or Greencard holder, or some other ties to a foreign jurisdiction, *provide details*

Other Notes:

CONSENT FORM

I (we) consent to the electronic filing of my (our) 2009 personal tax return(s) and all future taxation years until such time as this authorization is revoked:

Yes No

Are you a Canadian citizen?

Yes No

Do you authorize Canada Revenue Agency to provide your name, address and date of birth to Elections Canada to update your information on the National Register of Electors? Under the Canada Elections Act, your information can also be shared with provincial/territorial election agencies, Members of Parliament and registered political parties, as well as candidates at election time.

Yes No

I (we) would prefer a printed copy of my (our) return(s).

Yes No

I (we) would prefer a disk containing my (our) return(s) in PDF format.

Yes No

I (we) would prefer an email containing my (our) return(s) in PDF format. I (we) acknowledge that email may not be secure.

Yes No

If you choose to receive your return by email, please ensure you have provided your email address on page 1.

Print Name _____

Sign Name _____

Date _____

FOREIGN INCOME VERIFICATION STATEMENT

Did you own or hold specified foreign property at any time in 2009 with a total cost of more than \$100,000 (CAD)?

Yes No

If no, please sign below. If yes, please provide our office with the details.

Specified foreign property includes:

- funds in foreign bank account;
- shares of Canadian corporations on deposit with a foreign broker;
- shares of non-resident corporations on deposit with a Canadian or foreign broker;
- land and buildings located outside Canada, such as a foreign rental property;
- precious metals, gold certificates, and futures held outside Canada;
- interests in mutual funds that are organized in a foreign jurisdiction;
- debts owed by non-resident persons, such as government or corporate bonds, debentures, mortgages, and notes receivable;
- an interest in or a right to any specified foreign property;
- property that is convertible or that can be exchanged for a right to acquire specified foreign property;
- an interest in a partnership where the share of income or loss of the partnership for non-resident members is 90% or more and the partnership holds specified foreign property;
- an interest in a non-resident trust or a non-resident trust deemed to be resident by section 94 of the Income Tax Act (discretionary trust);
- patents, copyrights and trademarks held outside Canada; and
- an interest in, or a right with respect to, an entity that is non-resident.

Specified foreign property does not include:

- property used or held exclusively in the course of carrying on an active business;
- personal-use property (i.e., property used primarily for personal use and enjoyment, such as a vacation property used primarily as a personal residence);
- an interest in a US Individual Retirement Account (IRA);
- shares of the capital stock, or indebtedness, of a non-resident corporation that is a foreign affiliate;
- an interest in, or indebtedness, of a non-resident trust that is a foreign affiliate;
- an interest in a non-resident trust that neither you nor a person related to you had to pay for in any way;
- an interest in a non-resident trust principally providing superannuation, pension, retirement or employee benefits primarily to non-resident beneficiaries, that does not pay income tax in the taxing jurisdiction where it is resident; or
- an interest in, or a right to acquire any of the above-noted excluded foreign property.

I certify that I did not own or hold a beneficial interest at any time in the 2009 taxation year of specified foreign property that had a total cost of more than \$100,000 (CAD).

Print Name _____

Sign Name _____

Date _____