

PERSONAL TAX ORGANIZER

For the year 2018



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After completion, you can either print and bring the form to our office or email it to info@hwgr.ca

Please complete this T1 Organizer before your appointment or before you bring in your personal tax information. Please attach all slips, lists and other supplemental information applicable to your situation. Complete a new Organizer for each married couple.

1. Personal Information

	Name	Phone	Fax	Cell	Email
Taxpayer	<input type="text"/>				
Spouse	<input type="text"/>				
Address	<input type="text"/>				

Marital Status: Married Single Common-law Separated Divorced Widowed

If married or common-law, are we preparing both returns? Yes No

If no, we require the net income of your spouse's current income tax return:

Date of change in marital status if changed in the current year:

2. Elections Canada

Is the taxpayer a Canadian citizen? Yes No

Is the spouse a Canadian citizen? Yes No

3. Foreign Reporting

Did the taxpayer own or hold foreign property or investments with a total cost of more than CDN \$100,000 at any time during the year? If yes, please provide list. Yes No

Did your spouse own or hold foreign property or investments with a total cost of more than CDN \$100,000 at any time during the year? If yes, please provide list. Yes No

4. Dependants

Name	Relationship	Date of Birth (MM/DD/YYYY)	SIN	Income	Child Care Expense (attach receipts)	Child Care Provider Name	Provider SIN or BN
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Check if applicable:

5. Students (Taxpayer or Dependant)

T2202 - Tuition amount attached?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A
Receipts for government student loan interest attached?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A

6. General Income

Taxpayer

Spouse

T4 slips - Employment income attached?	<input type="checkbox"/>	<input type="checkbox"/>
T4A slips - Commission and self-employment attached?	<input type="checkbox"/>	<input type="checkbox"/>
T4E slips - Employment Insurance Benefits attached?	<input type="checkbox"/>	<input type="checkbox"/>
List of support payments made or received attached?	<input type="checkbox"/>	<input type="checkbox"/>
Details of any other income attached?	<input type="checkbox"/>	<input type="checkbox"/>

7. Pension Income

Taxpayer

Spouse

T4A slips - Pension, retirement and annuity income attached?	<input type="checkbox"/>	<input type="checkbox"/>
T4A(P) slips - Canada Pension Plan benefits attached?	<input type="checkbox"/>	<input type="checkbox"/>
T4A(OAS) slips - Old Age Security income attached?	<input type="checkbox"/>	<input type="checkbox"/>
T4RSP/T4RIF slips - Other pension income attached?	<input type="checkbox"/>	<input type="checkbox"/>
T5007 slips - Social assistance attached?	<input type="checkbox"/>	<input type="checkbox"/>
Does the taxpayer elect to split eligible pension income with his/her spouse or common-law partner?	<input type="checkbox"/>	<input type="checkbox"/>

8. Investment Income

Taxpayer

Spouse

T3 slips - Statement of trust income attached?	<input type="checkbox"/>	<input type="checkbox"/>
T5 slips - Statement of investment income attached?	<input type="checkbox"/>	<input type="checkbox"/>
T5013/T5013A - Statement of partnership income attached?	<input type="checkbox"/>	<input type="checkbox"/>
T5008 - Statement of security transactions attached?	<input type="checkbox"/>	<input type="checkbox"/>
Any disposals of property, stocks, bonds etc. during the year?	<input type="checkbox"/>	<input type="checkbox"/>

If yes, please provide the following **details and documents** for "each" piece of property, stock or bonds sold:

- | | |
|--|---------------------|
| - Description of property, stock or bonds; | - Sale proceeds; |
| - Date acquired; | - Date of disposal; |
| - Original cost; | - Expenses of sale. |

Any disposals of a principal residence during the year?	<input type="checkbox"/>	<input type="checkbox"/>
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If yes, please provide the year of acquisition, the proceeds and the property description.

If not a principal residence for every year owned, please advise us.

9. Rental Income

Taxpayer

Spouse

Summary of revenue and a list of expenses attached?	<input type="checkbox"/>	<input type="checkbox"/>
List of auto expenses incurred for business activity and totals for both personal and business mileage for the year attached?	<input type="checkbox"/>	<input type="checkbox"/>
Meals and entertainment amount included in list of expenses attached?	<input type="checkbox"/>	<input type="checkbox"/>
Invoices for capital expenditures in the year attached?	<input type="checkbox"/>	<input type="checkbox"/>
Details of proceeds of disposals (and original cost) of any capital assets sold or traded attached?	<input type="checkbox"/>	<input type="checkbox"/>

10. Business, Commission or Professional Income

Taxpayer

Spouse

Schedule of revenue and expenses attached?	<input type="checkbox"/>	<input type="checkbox"/>
Invoices for capital expenditures in the year attached?	<input type="checkbox"/>	<input type="checkbox"/>
Details of proceeds of disposals (and original cost) of any capital assets sold or traded attached?	<input type="checkbox"/>	<input type="checkbox"/>
Office in home expenses attached (only if you have no business location)?	<input type="checkbox"/>	<input type="checkbox"/>

11. Farming Income	Taxpayer	Spouse
Details of income and expenses attached?	<input type="checkbox"/>	<input type="checkbox"/>
AGR-1 slips - Statement of Farm Payments attached?	<input type="checkbox"/>	<input type="checkbox"/>
T4A slips - patronage payments attached?	<input type="checkbox"/>	<input type="checkbox"/>
Invoices for capital expenditures in the year attached?	<input type="checkbox"/>	<input type="checkbox"/>
Details of proceeds of disposals (and original cost) of any capital assets sold or traded attached?	<input type="checkbox"/>	<input type="checkbox"/>
Details of grain advances, repayments in the year and the year end statement attached?	<input type="checkbox"/>	<input type="checkbox"/>
Details on inventory on hand at December 31(should not include deferred grain sales)?	<input type="checkbox"/>	<input type="checkbox"/>
Details of purchased inventory included in inventory listing?	<input type="checkbox"/>	<input type="checkbox"/>
Were there any land acquisitions or disposals? Attach the Statement of Adjustment from lawyer and the breakdown of purchase price between land and building.	<input type="checkbox"/>	<input type="checkbox"/>
Participating in AgriInvest?	<input type="checkbox"/>	<input type="checkbox"/>
Participating in AgriStability?	<input type="checkbox"/>	<input type="checkbox"/>
Details of proceeds for access by pipeline, seismic etc.?	<input type="checkbox"/>	<input type="checkbox"/>

12. Other Deductions or Credits Enclosed	Taxpayer	Spouse
RRSP contribution receipts attached?	<input type="checkbox"/>	<input type="checkbox"/>
Union/professional dues receipts attached?	<input type="checkbox"/>	<input type="checkbox"/>
T2200 Declaration of conditions of employment (signed by employer) attached?	<input type="checkbox"/>	<input type="checkbox"/>
TL2 - meals and lodging expenses (signed by employer) attached?	<input type="checkbox"/>	<input type="checkbox"/>
Receipts to support apprentice/trade person's tools attached?	<input type="checkbox"/>	<input type="checkbox"/>
Receipts to support teacher's school supplies attached? A certificate from your employer attesting to the eligible supplies expenses is needed.	<input type="checkbox"/>	<input type="checkbox"/>
Receipts to support the home accessibility credit attached? <i>Must be 65 years or older OR disabled.</i>	<input type="checkbox"/>	<input type="checkbox"/>
Volunteer firefighter tax credit?	<input type="checkbox"/>	<input type="checkbox"/>
Donation slips attached (must have the charitable donation number on it)?	<input type="checkbox"/>	<input type="checkbox"/>
Political donation slips attached?	<input type="checkbox"/>	<input type="checkbox"/>
Listing of moving expenses paid in the year attached?	<input type="checkbox"/>	<input type="checkbox"/>
Are you eligible for the "First Time Home Buyers Amount"?	<input type="checkbox"/>	<input type="checkbox"/>
Details of interest paid to earn investment income attached?	<input type="checkbox"/>	<input type="checkbox"/>
Details of accounting or legal fees paid attached?	<input type="checkbox"/>	<input type="checkbox"/>
Details for other deductions or credits attached?	<input type="checkbox"/>	<input type="checkbox"/>

13. Medical	Taxpayer	Spouse
Medical receipts (includes dental, eyecare, prescriptions) attached? It would be helpful for your medical provider to give you a printout for your 2018 medical expenses.	<input type="checkbox"/>	<input type="checkbox"/>
Mileage for travel for medical purposes not provided in your area? If yes, we will need a log detailing the dates, purpose of the trip and the km travelled	<input type="checkbox"/>	<input type="checkbox"/>
Medical insurance premiums (Alberta Blue Cross, Manulife etc)?	<input type="checkbox"/>	<input type="checkbox"/>
Recoveries or reimbursements from insurance for any receipts provided?	<input type="checkbox"/>	<input type="checkbox"/>

****We require the receipts to be sorted by individual, then by provider, then by date.****

Additional notes for accountant: