

# PERSONAL TAX ORGANIZER

FOR THE YEAR 2020



Please print and bring the form to our office.  
Or scan and email it to [info@hwgr.ca](mailto:info@hwgr.ca)

4602 49 Avenue  
Camrose, AB T4V 0M6  
Phone: 780-672-2600  
Fax: 780-672-0057

## 1. Personal Information

	Name	Phone	Cell	Email
Taxpayer				
Spouse				
Address				

**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	<hr/>	
Date of change in marital status if changed in the current year	Yes	No

## 2. Elections Canada

	Taxpayer	Spouse
Is the taxpayer a Canadian citizen?	Y/N	Y/N

## 3. Foreign Reporting

	Taxpayer	Spouse
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.	Y/N	Y/N

## 4. Dependants

Name	Relationship	Date of birth (MM/DD/YYYY)	SIN	Income	Child Care Exp	Child Care Provider	Child Care SIN or BN

## 5. Principal Residence

Any disposals of a principal residence during the year?	Yes	No
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.		

<b>6. Students (Taxpayer or Dependant)</b>	<b>Taxpayer</b>	<b>Spouse</b>
T2202 - Tuition amount attached?	Y/N	Y/N
Receipts for government student loan interest attached?	Y/N	Y/N
<b>7. General Income</b>	<b>Taxpayer</b>	<b>Spouse</b>
T4 slips - Employment income attached?	Y/N	Y/N
T4A slips - Commission and self-employment / COVID-19 benefits attached?	Y/N	Y/N
T4E slips - Employment Insurance Benefits attached?	Y/N	Y/N
List of support payments made or received attached?	Y/N	Y/N
Details of any other income attached?	Y/N	Y/N
<b>8. Pension Income</b>	<b>Taxpayer</b>	<b>Spouse</b>
T4A slips - Pension, retirement and annuity income attached?	Y/N	Y/N
T4A(P) slips - Canada Pension Plan benefits attached?	Y/N	Y/N
T4A(OAS) slips- Old Age Security income attached?	Y/N	Y/N
T4RSP/T4RIF slips - Other pension income attached?	Y/N	Y/N
T5007 slips - Social assistance attached?	Y/N	Y/N
Does the taxpayer elect to split eligible pension income with his/her spouse or common-law partner?	Y/N	Y/N
<b>9. Investment Income</b>	<b>Taxpayer</b>	<b>Spouse</b>
T3 slips - Statement of trust income attached?	Y/N	Y/N
T5 slips - Statement of investment income attached?	Y/N	Y/N
T5013/T5013A - Statement of partnership income attached?	Y/N	Y/N
T5008 - Statement of security transactions attached?	Y/N	Y/N
Any disposals of property, stocks, bonds etc. during the year?	Y/N	Y/N
If yes, please provide the following details and documents for "each" piece of property, stock or bonds sold:	Y/N	Y/N
- Description of property, stock or bonds	- Sale proceeds	Y/N
- Date acquired	- Date of disposal	Y/N
- Original cost	- Expenses of sale	Y/N
<b>10. Rental income</b>	<b>Taxpayer</b>	<b>Spouse</b>
Summary of revenue and a list of expenses attached?	Y/N	Y/N
List of auto expenses incurred for business activity and totals for both personal and business mileage for the year attached?	Y/N	Y/N
Meals and entertainment amount included in list of expenses attached?	Y/N	Y/N
Invoices for capital expenditures in the year attached?	Y/N	Y/N
Details of proceeds of disposals (and original cost) of any capital assets sold or traded attached?	Y/N	Y/N
<b>11. Business, Commission or Professional Income</b>	<b>Taxpayer</b>	<b>Spouse</b>
Schedule of revenue and expenses attached?	Y/N	Y/N
CEBA, CEWS, TWS or other government (federal or provincial) subsidy applied for during the year?	Y/N	Y/N
Invoices for capital expenditures in the year attached?	Y/N	Y/N
Details of proceeds of disposals (and original cost) of any capital assets sold or traded attached?	Y/N	Y/N
Office in home expenses attached (only if you have no business location)?	Y/N	Y/N

12. Farming income	Taxpayer	Spouse
Details of income and expenses attached?	Y/N	Y/N
AGR-1 slips - Statement of Farm Payments attached?	Y/N	Y/N
T4A slips - patronage payments attached?	Y/N	Y/N
CEBA, CEWS, TWS or other government (federal or provincial) subsidy applied for during the year?	Y/N	Y/N
Invoices for capital expenditures in the year attached?	Y/N	Y/N
Details of proceeds of disposals (and original cost) of any capital assets sold or traded attached?	Y/N	Y/N
Details of grain advances, repayments in the year and the year end statement attached?	Y/N	Y/N
Details on inventory on hand at December 31(should not include deferred grain sales)?	Y/N	Y/N
Details of purchased inventory included in inventory listing?	Y/N	Y/N
Were there any land acquisitions or disposals? Attach the Statement of Adjustment from lawyer and the breakdown of purchase price between land and building.	Y/N	Y/N
Participating in AgriInvest?	Y/N	Y/N
Participating in AgriStability?	Y/N	Y/N
Details of proceeds for access by pipeline, seismic etc.?	Y/N	Y/N

13. Other Deductions or Credits Enclosed	Taxpayer	Spouse
RRSP contribution receipts attached?	Y/N	Y/N
Union/professional dues receipts attached?	Y/N	Y/N
T2200 Declaration of conditions of employment (signed by employer) attached?	Y/N	Y/N
TL2 - meals and lodging expenses (signed by employer) attached?	Y/N	Y/N
Receipts to support apprentice/trade person's tools attached?	Y/N	Y/N
Receipts to support teacher's school supplies attached? A certificate from your employer attesting to the eligible supplies expenses is needed.	Y/N	Y/N
Receipts to support the home accessibility credit attached? Must be 65 years or older OR disabled.	Y/N	Y/N
Receipts to a qualified Canadian journalism organization attached?	Y/N	Y/N
Did you work from home due to COVID-19?	Y/N	Y/N
Volunteer firefighter tax credit?	Y/N	Y/N
Donation slips attached (must have the charitable donation number on it)?	Y/N	Y/N
Political donation slips attached?	Y/N	Y/N
Listing of moving expenses paid in the year attached?	Y/N	Y/N
Are you eligible for the "First Time Home Buyers Amount"?	Y/N	Y/N
Details of interest paid to earn investment income attached?	Y/N	Y/N
Details of accounting or legal fees paid attached?	Y/N	Y/N
Details for other deductions or credits attached?	Y/N	Y/N

14. 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 2020 medical expenses.	Y/N	Y/N
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	Y/N	Y/N
Medical insurance premiums (Alberta Blue Cross, Manulife etc)?	Y/N	Y/N
Recoveries or reimbursements from insurance for any receipts provided?	Y/N	Y/N

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

Additional notes for accountant: