

Personal Tax Return Organizer **Year:**

Name		E-mail Address*	
Address			
City	Prov	Postal Code	
Business Phone		Residence Phone	
Cell Phone		Fax	
SIN	Date of Birth (y/m/d)		

The best way to contact you is by: e-mail phoning you at work phoning you at home phoning your cell
 Would you like to receive your tax documents by: **courier** (at no extra charge to yourself)
 picking it up at our office

If courier, please indicate where you would like us to courier the package to (couriers cannot be sent to postal boxes):

- Same address as above**
 If we are sending the package to your home, can it be left in your mailbox if you are not home? **Yes** **No**

- Different address** (please complete box below)

Company Name & Address		
City	Prov	Postal Code

US Citizen/Green card holder **Yes** **No**
 If yes: Are we preparing a: **Canadian tax return** **US tax return** **Both**
 Have you contributed to an RESP? **Yes** **No**

Marital Status **Married** **Divorced** **Single**
 Widowed **Separated** **Common Law** (including same sex)

Are we preparing a spousal return? **Yes** **No** If not, please provide:

SPOUSAL INFORMATION

Name	Net Income
SIN	Date of Birth (y/m/d)

US Citizen/Green card holder **Yes** **No**
 If yes: Has your spouse contributed to an RESP? **Yes** **No**

Dependent Children

Child's Name	Date of Birth (y/m/d)	Income	Attending University

- Would you like us to e-file your return (if recommended)? **Yes** **No**
 Do you have foreign assets >\$100,000 (including US shares held in Canadian accounts)? **Yes** **No**
 Are you a beneficiary of a foreign trust? **Yes** **No**

This question must be answered before your return can be e-filed:

Do you wish to authorize the Canada Revenue Agency to provide your name, address, and date of birth to Elections Canada for the National Register of Electors? **Yes** **No**
 (if left unanswered, NO will be selected automatically)

*Required

Personal Income Tax Return Checklist

- T4/W2 Slips**—Employment income, tips
- T4A Slips**—Pension, annuity, other income
- T4A(OAS)**—Old age security income
- T4A(P)**—CPP benefits
- T4U**—Employment Insurance benefits
- T4RIF**—Proceeds from RRIF
- T4RSP**—Proceeds from RRSP
- T5/1099**—Bank interest or taxable dividends
- T3**—Statement of trust income
- T600**—Bond interest coupons
- T5008**—Investment income
- T5013/K1**—Statement of partnership income
- Deferred stock option benefits
- US social security benefits
- Foreign source income
- T2200**—Declaration of conditions of employment
- Universal child care benefit
- List of employment expenses including: home office, entertainment, tradepersons' tools, auto (with amount of business and personal kilometers driven in year)*
- Rental properties—revenue & expenses*
- Capital gains—sale proceeds, commission, cost, dates of purchase and sale (obtain from broker if missing)
- First time home buyer, first time owning in 5 years, or home purchased to accommodate disability
- Purchase or sale of home
- RRSP contribution receipts
- Union or professional dues
- Interest expense & other carrying charges
- Student tuition receipts
- Medical expenses (summaries preferred, e.g. pharmacy, dentist)
- Charitable donation and political contribution receipts
- Tax installment receipts totalling \$_____
- Child care receipts
- Child fitness receipts
- Self-employment revenue and expenses including amounts for qualified Red Seal apprentices
- Prior year's Notice of Assessment or Reassessment
- Alimony and child support
- Tax shelter information
- Home Buyers Plan Repayment of \$_____
- Lifelong Learning Plan
- Interest on student loans
- Disability information for you or a family member
- Public transit passes totalling \$_____
- Moving expenses
- Property taxes (especially seniors)

*Blank schedules for Employment Expenses and Rental, Business and Professional Revenue and Expenses are available on our website, www.mclartyco.ca, on the Tax Planning and Compliance page under Our Services.

Notes to Preparer:
