

Nino G. Orlandi Professional Corporation

Tax organizer – Personal tax

Information checklist for preparation of personal tax return – Taxation year _____

If space is insufficient for any item, please enclose a list

Name:	Name:
Telephone number:	Telephone number:
S.I.N.	S.I.N.
Date of Birth:	Date of Birth:
Address:	(Please complete a separate envelope if spouse had taxable income in year. If I will not be preparing this tax return, please provide net income.)
Marital Status at December 31:	

Personal Information

Spouse or common-law information

(If first year of preparation, please enclose copy of last year's tax returns and Notices of Assessment)

Information on dependent children

Name:	Name:	Name:	Name:
Date of birth:	Date of birth:	Date of birth:	Date of birth:
Income for year:	Income for year:	Income for year:	Income for year:

Common Income Sources	# of Slip's enclosed	Common Expense Sources	# of Slip's enclosed
Employment income (T4)		RRSP Contributions	
Old Age Security (T4OAS)		Union or professional dues	
Canada/Quebec Pension Plan (T4AP)		Safety deposit box	
Other Pension Income		Accounting fees	
Foreign Pension Income		Investment council fees	
U.I.C. Benefits (T4U)		Interest on money borrowed to invest	
Dividend Income (T5)		Tuition fees for self and dependents (T2202A)	
Interest Income (T5)		Medical Expenses	
Canada Savings Bonds (T600, T5)		Attendant care Expenses	
Foreign source income		Disability Tax Credit (T2201)	
Income from Limited Partnerships		Charitable donations	
RRSP Income (T4RSP)		Political Donations	
RRIF Income (T4RIF)		Tax paid by installments	
Retiring Allowance		Last years Notice of Assessment	
Scholarships, bursaries, etc.		Gain/loss infor. on sale of investments or R/E	
WSIB or other social assistance received		Childcare expenses (name+SIN of caregiver)	
Other-		Child sports receipts	
Other-		Other-	

	Yes	No
Did you dispose of any stocks, bonds, T-bills, real estate, mutual funds, or other property in the year? If Yes, list the sale proceeds, date and cost of acquisition, any carrying costs and costs incurred in selling the property.		
Did or do you own any savings bonds or other investments on which interest was or is compounding? If yes, provide a description, year of purchase, face value, purchase price and amounts previously included in income.		
Did you borrow money for investment purposes? If yes, provide the name of the lender, interest paid, principal o/s and investment purpose of loan.		
Did you earn rental income? If yes, list the gross rental income and all related expenses. If you bought rental property in the year include copy of the statement of adjustments and latest property tax bill.		
Do you agree to allow Revenue Canada to provide your name, address, and date of birth to Elections Canada?		
Did you move to start a new job or business in the year, if so, is your new residence at least 40 kilometers closer to your new work location? If yes, list all receipts and details of selling and moving expenses, including costs of maintaining a vacant former residence..		
Were you self-employed in the year? If yes, provide a summary of revenue and expenses, including GST charged and paid. Also, provide a list of fixed assets bought in the year. Please call for more details on this!		
Did you incur employment expenses for which you were not reimbursed by your employer? If yes, provide a list of expenses and obtain a completed and signed Form T2200 from your employer		

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	YES	NO
If you answered yes to either of the two above questions, did you incur automobile expenses?		
If Yes, provide the following:		
Total # of kilometers driven during the year-		
Total # of kilometers driven to earn income during the year-		
Auto Insurance expense		
Auto License expense		
Auto gas expense		
Repairs and maintenance expense (including car wash, CAA, etc.)		
Parking		
Details on automobile purchased in the year		
Loan interest on purchased automobile		
Lease payments made in the year		
Did you or your dependants have a severe mental or physical impairment in the year, and did the impairment markedly restrict your or your dependents day-to-day activities. If yes, contact me concerning form T2201.		
Did you receive/pay any alimony or maintenance allowances in the year? If this is your first year of doing so, provide a copy of divorce or separation agreement. For payer, provide name, S.I.N., and address of payee.		
Did you or your dependents incur any medical, dental, optical or related expenses, including premiums paid to private health care plans (i.e. Blue Cross) and for travel medical insurance for out-of-province trips?		
Did you pay rent or property taxes in the year? List amount paid, name and address of landlord/municipality.		
Have you enclosed your prior years Notice of Assessment and any other documents received from Canada Revenue Agency during the past year?		
Will you be claiming a credit for the education and tuition fees of a dependent, if available? If yes, obtain signature of dependent on back of Form T2202A "Tuition and education Credit Certificate" and provide details of dependents income.		
At any time in the year did you hold foreign property with a total cost of more than \$100,000 CDN?		
Have you provided all your world income to me?		

- Some other expenses that may be deductible include,
- legal expenses related to obtaining additional income (in certain employment and matrimonial situations),
 - adoption related expenses,
 - public transit passes under certain conditions,
 - disability supports (eg. sign language services, talking textbooks, etc.) for purposes of employment or education,
 - interest on qualifying student loans,

Please list below any additional information regarding your personal income taxes in addition to any questions you may have.