

Howland Tax Services

2008 Personal Tax Organizer (Canada)

Personal Information

You	Your Spouse
Name	Name
Social Insurance #	Social Insurance #
Address	Address (if different)
Postal Code	Postal Code
Phone/Fax	Phone/Fax
Email	Email
Canadian Citizen? <input type="checkbox"/> Yes <input type="checkbox"/> No	Canadian Citizen? <input type="checkbox"/> Yes <input type="checkbox"/> No

New Clients

You	Your Spouse
Birth Date	Birth Date
Marital Status	
<input type="checkbox"/> Single	<input type="checkbox"/> Married
<input type="checkbox"/> Divorced	<input type="checkbox"/> Separated
	<input type="checkbox"/> Common-Law
	<input type="checkbox"/> Widowed

New clients please provide a copy of the last tax return filed.

All Clients

Do you want to start or change Direct Deposit of refunds into your bank account (income tax refunds, GST/HST Credits, Canada Child Tax Benefits, or Universal Child Tax Benefits)? If yes, provide the following information, or attach a VOID cheque to your tax return:

Branch Number _____
 Institution Number _____
 Account Number _____

Do you want to eFile your return to speed up processing? Yes No

Did your marital status change during the year? Yes No

If yes, indicate date of change. _____

If you are married or living common-law and we are not preparing your spouse's return, please provide your spouse's name, Social Insurance Number, and net income from Line 236 of the spouse's income tax return.

Dependant Information				
Name				
Birth Date				
Relationship				
Social Insurance #				
Net Income				

Did you receive the Canada Child Tax Benefit (CCTB) for any of your children in 2008?

Yes No

Did you pay childcare expenses in 2008?

Yes No

If yes, please provide details, including Social Insurance Numbers of individual daycare providers:

_____	_____
_____	_____
_____	_____

Do you authorize Canada Revenue Agency to provide your name, address, and date of birth to Elections Canada for the National Register of Electors?

Yes No

Did you own foreign property at any time in 2008 with a total cost of more than \$100,000 CAD?

Yes No

If yes, please provide details:

Cost of property	_____	_____
Type of property	_____	_____
Location of property	_____	_____

Did you immigrate to or emigrate from Canada during 2008?

Yes No

If yes, indicate date of change of residency _____

U.S. citizens: did you have more than \$10,000 (USD) in a Canadian bank account at any time during 2008?

Yes No

Income & Expenses

Income Items

- T1204 - Government Service Payments
- T3 - Trust Income Allocation and Designations
- T4 - Statement of Remuneration Paid
- T4A - Pension, Retirement, Annuity and Other Income
- T4(OAS) - Old Age Security
- T4A(P) - Canada Pension Plan
- T4E - Employment Insurance Benefits
- T4RSP - RRSP Income
- T4RIF - RRIF Income
- T5 - Investment Income
- T5008 - Securities Transactions
- T5013 - Partnership Income
- Foreign Pensions or U.S. Social Security
- Any other tax slips or income received (AGR-1, NR4, T101, T4F, T4PS, T5006, T5007, etc.)

Deductible Items

- Public transit passes - provide receipts
- Children's Fitness Credit - provide receipts
- RRSP contribution receipts
- Charitable donation receipts
- Medical expenses - provide all receipts and indicate reimbursements from medical plans
- Investment expenses and carrying charges (e.g. interest, investment counsel fees, safety deposit box fees, etc.)
- Tuition fees of more than \$100 - obtain T2202A form or receipt from educational institution
- Student loan interest forms
- Moving expense receipts, if the move brought you 40 kms closer to workplace or school

- Union dues
- Employment expenses - Form 2200 required from employer

Also Provide...

- Details of assets sold during the year (stocks and bonds sold outside RRSP, real estate, equipment, autos, etc.) with documentation of their cost
- Details of Canada Savings Bonds cashed
- Income and expenses from rental properties, business or partnership
- Contributions to federal and provincial political parties
- Details on alimony/maintenance received or paid
- Assessment notices and correspondence received from Canada Revenue Agency
- Receipts for tax paid by installments - total installments paid for 2008: _____
- Mailing labels from Canada Revenue Agency

Cross-Border Items

If you require U.S. tax preparation, please include W2, 1099, 1042S or other U.S. tax slips.

If we did not or will not prepare your U.S. returns, please provide copies.

U.S. citizens with Canadian RRSPs: please provide 2008 RRSP statements.

U.S. citizens who reside in Canada and earn self-employment income can elect not to pay U.S. Social Security Tax on that income by filing Form CPT56 *Certificate of Coverage Under the Canada Pension Plan* with their U.S. return. This form should be obtained well in advance. Please contact us as soon as possible.