

Howland Tax Services

2009 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"/> Common-Law	
<input type="checkbox"/> Divorced	<input type="checkbox"/> Separated	<input type="checkbox"/> Widowed	

New clients please provide copies of the last tax returns 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.

Name: _____ SIN: _____ Net Income: _____

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 2009?

Yes No

Did you pay childcare expenses in 2009?

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 2009 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 2009?

Yes No

If yes, indicate date of change of residency _____

Home Renovation Tax Credit

Did you make eligible expenses to improve your house, condo or cottage, with the work performed or goods acquired after Jan. 27, 2009 and before Feb. 1, 2010 (under an agreement entered into after Jan. 27, 2009)?

Yes No

If yes, please provide documentation and receipts.

Note: renovation or alteration expenses are generally eligible if they are of an enduring nature and will become a permanent part of your home. You must own the home and you, your spouse, or your children must have lived in the home (i.e. "ordinarily inhabited" it) at some time between Jan. 27, 2009 and Feb. 1, 2010.

First Time Home Buyers' Tax Credit

Did you or your spouse buy a new home after January 27, 2009?

Yes No

If yes, did you live in another home owned by you or your spouse in the year of acquisition or any of the four preceding years?

Yes No

U.S. Citizens

Did you have more than \$10,000 (USD) in Canadian financial accounts (including bank, RRSP, or investment accounts) at any time during 2009?

Yes No

If yes, Form TD F 90-22.1 must be filed with the U.S. Department of the Treasury by June 30, 2010 (received, not postmarked). If you want us to complete this form for you, please provide name and addresses of financial institutions, account numbers and types, and maximum values of each account during 2009 (in US dollars).

If we did not or will not prepare your U.S. returns, please provide copies. If you require U.S. tax preparation, please include W2, 1099, 1042S or other U.S. tax slips.

U.S. citizens with Canadian RRSPs: please provide 2009 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.

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 reimbursements from medical plans
- Investment expenses and carrying charges (e.g. interest, investment counsel fees, safety deposit box fees, etc.)
- Tradesperson tools and expenses - provide receipts
- 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, provide receipts
- 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 2009: _____
- Mailing labels from Canada Revenue Agency

Additional Items

This Personal Tax Organizer is not intended to be a complete list. Please provide details regarding any other income or expenses not listed above.
