



PERSONAL TAX ORGANIZER
YEAR(S) _____

Mr. Mrs. Ms.

First Name: _____ **Last Name:** _____

Mailing Address: _____

Social Insurance Number: _____ **Date of Birth:** _____ (y/m/d)

Phone: Home: _____ My Work: _____ My Cell: _____

Email Address: _____

Have we prepared your tax return before? Yes No

Marital Status: Single Married Common Law
 Divorced Separated Widow(er)

If your marital status changed during the year provide the date of change _____ (m/d)

Spousal Information (if applicable):

Name: _____ SIN #: _____

Date of Birth: _____ (y/m/d) Net Income if not preparing return _____

Work Phone: _____ Cell: _____ Email Address: _____

Dependent Children (who live with you):

Name	Relationship	Date of Birth (y/m/d)	Income
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

The following questions must be answered before your return can be e-filed:

Do you want your email address provided to CRA for online mail? Yes No

Did you sell your residential home or other property in the current year? Yes No

Are you/spouse Canadian citizen(s)? Yes No

Do you agree to the Canada Revenue Agency providing your name, address and date of birth to Elections Canada to keep the national voters list up to date? Yes No

Do you own foreign property at any time during the year with a cost of more than CAN\$100,000? Yes No

NORTHERN RESIDENCE DEDUCTION

Did you live in Nunavut since January 1st for the year(s) filing? Yes No

If you answered no, please provide us with your former address and the date you moved here or left.

Did you have housemates or roommates? Yes No

If you shared accommodations with others, provide a list of people who lived with you (including your spouse but not including dependent children). Are any of them claiming a Northern Deduction? If so, how much are they claiming? Full = Basic claim per day plus the additional claim per day for the house / apartment that you live in.

Note: If any person in the household has claimed Full then no one else can claim anything.

Name _____ Claiming deduction? Full Basic None

Name _____ Claiming deduction? Full Basic None

TRAVEL DEDUCTION

Did your employer report a travel benefit in Box 32 of your T4 slip? Yes No

Did you travel or go on vacation? Yes No

If yes to both questions, please complete the separate **Travel Deduction Form** (enclosed).

DIRECT DEPOSIT

Does CRA have your banking information? Yes No

If no to the above, provide banking information to change the account CRA has or start the direct deposit.

Transit/Branch# _____ Bank/Institution Code _____ Account# _____ Taxpayer

Transit/Branch# _____ Bank/Institution Code _____ Account# _____ Spouse