



Personal Tax Organizer 2015 Tax Year

Name: _____ Spouse/Common-law partner: _____

S.I.N. (new clients): _____ S.I.N. (new clients): _____

Date of birth (new clients): _____ Date of birth (new clients): _____

Marital status: _____ (married, living common-law, widowed, divorced, separated or single)

Address: _____ Email: _____

Home: _____ Work: _____ Cell: _____ Fax: _____

Dependant's Name	Relationship	Date of birth	Disability, if any	Net Income
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Tax Preparation Services and Delivery

Tax package 2015 Personal Tax Returns Enhanced Tax Planning (\$350 for 1-hour planning session)

Delivery of tax return Electronic only via Portal* Pickup Courier (courier charge applies)

* This is a free service available to our clients which provides for secure online exchange of information. For a login and password, email taxes_waterloo@bdo.ca.

*** NEW CLIENTS ONLY*** ITEMS TO BE SIGNED AND RETURNED TO US PRIOR TO PREPARATION OF RETURN:

Personal Tax Return Engagement letter signed Foreign Reporting Checklist

Privacy consent forms (if changes or not completed in prior years)

Forms available at <http://bdoreinvestor.ca/personal-tax-returns/>.

Reminder: Please provide your Notice of Assessment for 2014 and any Notice of Reassessments received for any year.

Do you want us to e-file your return? Yes No

Do you want us to paper-file your return? Note: there is an additional charge for paper filed returns Yes No

Are you a Canadian citizen? Yes No

If a Canadian citizen, do you authorize the CRA to give your name, address, date of birth and citizenship to Elections Canada for the National Register of Electors? Yes No

Are you a U.S. citizen or green card holder? Yes No

Have you spent more than 30 days in the U.S. in any of the last three years? Yes No

If yes, please provide the number of days spent in the U.S. in each of: 2013 _____ 2014 _____ 2015 _____

INCOME — DID YOU RECEIVE:	YES	NO	IF YES — SEND US:
Employment or commission income			T4 or T4PS slips and details of other benefits or employment income not on T4 slips (e.g. tips)
Payments from an estate or trust			T3 slips or related information
Old Age Security benefits			T4A(OAS) slip
Canada Pension Plan benefits			T4A(P) slip
Pension income **Split with spouse? <input type="checkbox"/> Yes <input type="checkbox"/> No			T4RSP/T4RIF/T4A slips
Employment insurance benefits			T4E slip
Canadian dividends or interest			T3/T5 slips
Investment in tax shelters/limited partnerships/REITs?			Details, T5013/T3 slips
Universal child care benefits (children under 18 years old)			RC62 slip
Income from sources outside Canada			Slips or details where no slips available
Rental income *Are you registered for GST/HST? <input type="checkbox"/> Yes <input type="checkbox"/> No			Details of income and expenses - Please use the Real Estate Rentals Tax Checklist at: bdoreinvestor.ca/personal-tax-returns/
Business/professional/farming/fishing income **Did you hire an eligible apprentice in your business? <input type="checkbox"/> Yes <input type="checkbox"/> No **Are you registered for GST/HST? <input type="checkbox"/> Yes <input type="checkbox"/> No Please use the Business or Professional Activities Tax			Details of income and expenses Provide the following: (1) the number of internet webpages/websites your business earns income from; (2) a list of the webpages/site addresses; and (3) the percentage of gross income generated from the webpages/websites

Checklist at: http://bdoreinvestor.ca/personal-tax-returns/			
Proceeds from the sale of any stocks, bonds, real estate, timber or options or redemption of any mutual fund units			Description of assets, year of acquisition, date and proceeds of disposition, adjusted cost base and selling costs, and your annual trading summary
Any income not listed above (e.g. social assistance, Workers' Compensation, etc.)			Slips or details where no slips available
DEDUCTIONS/CREDITS – FOR THIS TAX YEAR, DID YOU:	YES	NO	IF YES – SEND US:
Contribute to or roll-over eligible income to an RRSP			Tax receipts
Pay interest on your student loan in the current year, or in prior years and have not claimed it			Interest statements
Pay union or professional dues			Tax receipts
Make an investment in a labour-sponsored venture fund			Federal and provincial tax receipts – T5006
Incur costs for monthly or longer, public transit passes; certain shorter duration passes may also qualify			Transit passes with paid receipts
Incur expenses to enrol children under 16 years old in a prescribed program(s) of physical, artistic, cultural, recreational or developmental activity			Official receipts and details
Incur moving expenses to move at least 40 kms closer to work or school			Details and receipts
Pay or receive alimony or maintenance support pursuant to a court order or written agreement. Please provide a copy of the agreement. Date of Agreement (or date of substantial amendment)_____			To/from whom: _____ SIN: _____ Address: _____ Amount: \$ _____
Pay child care expenses so you could work or attend school (including summer camp)			Details and receipts
Incur expenses to earn investment income (e.g. investment counsel or “wrap” fees, interest)			Details and receipts
Make charitable or political donations			Tax receipts
You, your spouse or dependent child become disabled			Form T2201 to be completed by your physician
Pay for medical or dental expenses for which you were not reimbursed or for premiums for extended medical or dental coverage, including out of country medical coverage			List of expenses and the receipts (any 365 day period ending in the current year is eligible)
Invest in any tax shelters or receive any reporting regarding any prior years			Details, T5003, etc.
Incur any board/lodging costs as a transport employee			Form TL2 to be completed by your employer
Incur any expenses to maintain an office in your home as required by your employer - Please use the Workplace in the Home Tax Checklist at the link below.			Form T2200 to be completed by your employer Details of GST paid by you for the expenses
Incur any automotive or business expenses as an employee - Please use the Employment Expenses Tax Checklist at: http://bdoreinvestor.ca/personal-tax-returns/			Form T2200 to be completed by your employer Auto log
Buy any tradesperson's or apprentice mechanic's tools			Receipts
You, your spouse or any of your dependent children attend university or college			Form T2202A/T2202/TL11B/TL11C slip signed by the student
Support any relatives who were disabled, or did you reside with and provide in-home care for a parent or grandparent who is over 65, or for an infirm dependent adult relative			Details, including the income of the person receiving the care
Incur any exploration and development expenses			T101/102 slips
Adopt a child under 18 years old during the year			Details of adoption fees, other expenses
Pay any foreign taxes			Details
Purchase your “first home” or one for a disabled person			Details
Volunteer as a firefighter or as a search and rescue volunteer for at least 200 hours in the year			Details
OTHER – DID YOU:	YES	NO	IF YES – SEND US:
Pay any federal tax instalments for the taxation year other than amounts deducted at source			Amount: \$ _____ Provide receipts and latest statement of account
Withdraw funds from your RRSP during the year or in a prior			Details

year for the Home Buyers' Plan or Lifelong Learning Plan			
Have a spouse or dependant with income and BDO is not preparing the return			Details of spouse/dependant's income
<i>For Ontario and Manitoba Residents:</i> Pay property taxes or rent during the year			Details of amount paid and (1) if property taxes, the name of the municipality or (2) if rent, the name of the landlord
Change or add direct deposit information			A copy of a cheque for the setup of direct deposit. (Note that The Government of Canada is switching to direct deposit for all payments that it issues.)

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