



# 2017 Personal Tax Organizer

Name: \_\_\_\_\_ Spouse/Common-law partner: \_\_\_\_\_  
 S.I.N.: \_\_\_\_\_ S.I.N.: \_\_\_\_\_  
 Date of birth: \_\_\_\_\_ Date of birth: \_\_\_\_\_  
 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
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

### DELIVERY OF TAX RETURN:

- Electronic via Portal\*  Hard Copy - Pick-up  
 Electronic via Email (password protected)  Hard Copy - Courier (courier charge will be applied)

\*This is a free service available to our clients which provides for the secure online exchange of information.

### ITEMS TO BE SIGNED AND RETURNED TO US PRIOR TO PREPARATION OF RETURN:

- Foreign Reporting Checklist  
 Privacy consent forms (if changes or not completed in prior years)  
 Engagement letter (if one was included in your package)

Reminder: Please provide your Notice of Assessment for 2016 and any Notice of Reassessments received for any year.

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: 2015 \_\_\_\_\_ 2016 \_\_\_\_\_ 2017 \_\_\_\_\_

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 pension income 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
Income from tax shelters/limited partnerships/REITs?			Details, T5013/T3 slips
Income from sources outside Canada			Slips or details where no slips available
Rental/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 appropriate Tax Checklist at: <a href="http://bdoreinvestor.ca/personal-tax-returns/">http://bdoreinvestor.ca/personal-tax-returns/</a>			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
Proceeds from the sale of any stocks, bonds, real estate (for your principal residence, see next point), 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
Proceeds from the sale of your principal residence			Year of acquisition, proceeds of disposition, and description of property
Any income not listed above (e.g. social assistance, Workers' Compensation, etc.)			Slips or details where no slips available

We will hold your personal information to prepare your return in compliance with our Privacy Statement ([www.bdo.ca](http://www.bdo.ca)).

DEDUCTIONS/CREDITS – FOR THIS TAX YEAR, DID YOU:	YES	NO	IF YES – SEND US:
Contribute to or roll-over eligible income to an RRSP/PRPP			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			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 for the period from January 1, 2017 to June 30, 2017
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 (Federal credit has been eliminated; now only available for residents of B.C., Manitoba, Québec, and the Yukon)
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, and indicate the date of agreement (or date of substantial amendment) _____			To/from whom and SIN: _____ Address: _____ Amount: \$ _____
Pay child care expenses so you could work or attend school (including summer camp)			To whom and SIN/BN: _____ Address: _____ Amount: \$ _____ If boarding school or camp, # of weeks: _____
Incur expenses to earn investment income (e.g. investment counsel or “wrap” fees, interest)			Details and receipts
Make charitable or political donations **Claimed donation credit any year after 2007? <input type="checkbox"/> Yes <input type="checkbox"/> No			Tax receipts
Or your spouse or dependent child become disabled in 2017			Form T2201 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 completed by your employer
Incur any expenses to maintain an office in your home as required by your employer			Form T2200 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 appropriate Tax Checklist at: <a href="http://bdoreinvestor.ca/personal-tax-returns/">http://bdoreinvestor.ca/personal-tax-returns/</a>			Form T2200 completed by your employer Auto log
Buy any tradesperson's or apprentice mechanic's tools			Receipts
Or your spouse or any of your dependent children attend university or college			Form T2202A/T2202/TL11B/TL11C slip signed by the student
Support an infirm dependent spouse, an infirm dependent minor child, or any infirm dependent adult relatives			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 and other expenses
Pay any foreign taxes			Details
Purchase a “first home” or one for a related disabled person			Details
Incur expenses to make a home more accessible			Details
Volunteer as a firefighter or as a search and rescue volunteer for at least 200 hours in the year			Details
Purchase school supplies as an eligible educator			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 year for the Home Buyers' Plan or Lifelong Learning Plan			Details
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