



## Personal Tax Return Year-End Organizer

**Client Name:** \_\_\_\_\_ **Date of Birth:** \_\_\_\_\_

**Phone Number:** (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ **E-mail Address:** \_\_\_\_\_

**Moore, McDermott Contact Name:** \_\_\_\_\_

The following information, where applicable, will be required in order to complete your income tax return:

1. Do you authorize us to release your name, address & birthdate to Elections Canada? YES  NO
2. Do you authorize us to electronically file your 2017 tax return YES  NO
3. Are you a Canadian citizen? YES  NO
4. Are you a US citizen or a "Green Card Holder" living in Canada? YES  NO

If yes, there are significant additional filing requirements by the US I.R.S. We can provide information as to what is required; however, you will need to contact a US tax preparer to prepare the returns.

5. Did you move during the year? If so, please provide your new address: YES  NO

(CRA now requires reporting of person's residence disposition)

- |                           |                                     |
|---------------------------|-------------------------------------|
| a) Date of sale _____     | b) Proceeds of sale _____           |
| c) Selling costs _____    | d) Purchase price of property _____ |
| e) Date of purchase _____ | f) Other information _____          |

6. Did your marital status change in the year? YES  NO

**If yes, please provide the following information:**

(Canada Revenue agency will consider anyone living together and having conjugal relations for a 12 month period at the end of 2017 as common-law or if you have a child together)

- a) Type of Change (mark one):  Divorce /  Common Law /  Marriage
- b) Spouse's Name: \_\_\_\_\_
- c) Birthdate: \_\_\_\_\_ c) Social Insurance Number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_
- d) Date of your marriage, if married this year: \_\_\_\_\_
- e) Date of separation or divorce if within the year: \_\_\_\_\_
- f) Date you began living with your Common Law Spouse: \_\_\_\_\_
- g) Spouse's Net Income: \$ \_\_\_\_\_
- h) Please provide all children's name and birthdates (born in 2000 or later), or child born prior to 2000 if dependent due to disability:
  1. \_\_\_\_\_
  2. \_\_\_\_\_
  3. \_\_\_\_\_



**7. Did you pay or receive Alimony or child support during the year?** YES  NO

**If yes, please provide the following information:**

(If this is the first year of support payments, we will need a copy of the agreement to determine deductibility)

a) How much deductible? \_\_\_\_\_

b) How much non-deductible? \_\_\_\_\_

**8. Do you have a Parent/ Grandparent over the age of 65 living with you?** YES  NO

**If yes, provide the following:**

a) Name of Parent/Grandparent: \_\_\_\_\_

b) Relationship to you: \_\_\_\_\_

c) Social Insurance Number: \_\_\_\_-\_\_\_\_-\_\_\_\_ d) Net Income: \$\_\_\_\_\_

**9. Do you have a Parent/ Grandparent who is eligible for the Disability Tax Credit** YES  NO

If yes, please contact us to further discuss your tax credit possibilities.

**10. Are you a first-time home buyer after January 27, 2009?** YES  NO

If yes, you may qualify for the First-Time Home Buyer's Tax Credit.

Please provide us with the home acquisition information.

**11. Did you buy or sell any property, stocks or other investments in the year?** YES  NO

**If yes, provide the following for EACH sale:**

a) Did you buy or sell? \_\_\_\_\_ b) What was it? \_\_\_\_\_

c) Date of sale: \_\_\_\_\_ d) Proceeds of sale: \_\_\_\_\_

e) Selling costs: \_\_\_\_\_ f) Purchase price of property: \_\_\_\_\_

g) Date of purchase: \_\_\_\_\_ h) Other information: \_\_\_\_\_

Buy	Sell
-	-
-	-
-	-

**12. Do you have foreign property in excess of \$100,000 at your Canadian \$ cost?** YES  NO

If yes, please provide the foreign property summary provided by your broker. As well as details of all income received from foreign sources in the year including: investment income, property income, business income, pension income or other income, and details of any foreign taxes paid in the tax year.

**13. Are you receiving eligible pension or RRIF income?** YES  NO



- a. If yes, do you and your spouse wish to split this income, as needed, in order to best reduce your combined income taxes? YES  NO

**14. We require all details concerning income (losses) for business, professional practice, rental farming, etc.)**

You can find our forms to assist you in providing this information at:  
<http://www.mmandp.com/links/#personaltax>

**15. We require all other information slips; please indicate the number of slips beside each type:**

- T4 – Salaries and employment income
- T4E – Employment insurance
- T4A – Employment (including retiring allowance)
- T4A(OAS) – Old Age Security
- T4A(P) – Canada Pension
- T4RIF – Registered retirement income fund
- T4RSP – Withdrawal from an RRSP
- T2200 – Declaration of conditions of employment
- T2202A – Tuition receipt
- T3 – Mutual fund investment income
- T5 – Dividends and interest
- T5007 – WCB benefits
- T5013 – Partnership income
- RC62 – Universal child care benefit
- RC210 (WITB) – Working income tax benefit
- RRSP – Retirement contributions
- Donations
- Political contributions
- Medical expenses
- Child care expenses
- Adoption expenses
- Public transit expenses
- Property tax (2017 tax bill)
- Rent (including number of months rented and name of landlord)
- Employment expenses
- Union dues

**16. Please provide details of your tax installments for the previous year (or installment slips from CRA)**