



**PERSONAL TAX ORGANIZER  
2019 TAXATION YEAR**

**Thank you for choosing RSP LLP to be your trusted tax return preparer.**

Please take a few minutes to fill out the Personal Tax Organizer. This document will help us to prepare your tax returns in a timely and efficient manner, and identify tax-saving opportunities for you and your family.

Unless indicated otherwise, all questions below refer to the 2019 year.

**Your name:** \_\_\_\_\_

**Email address:** \_\_\_\_\_

**Preferred way of contact (phone, email):** \_\_\_\_\_

**FOR NEW CLIENTS ONLY:**

If you are a new client of RSP, please provide (in the lines below) the *name, address, social insurance number, date of birth, and marital status* for each family member for whom a tax return is to be done.

Please also provide a copy of the prior year tax return and notice of assessment for each family member.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



## PART I: PERSONAL INFORMATION

- |  |          |          |
|--|----------|----------|
| <b>1. Has your basic information (e.g. name, address) changed in 2019?</b>   | <b>Y</b> | <b>N</b> |
| If yes, provide details of new name, address, and other relevant information.  |          |          |
| <b>2. Did you become married, or enter into a common-law relationship, in 2019?</b>  | <b>Y</b> | <b>N</b> |
| If yes,  |          |          |
| a. Provide date of marriage.   |          |          |
| b. Provide name, SIN and date of birth of spouse or common-law partner.  |          |          |
| c. Are we preparing a 2019 tax return for your spouse or common-law partner?   | <b>Y</b> | <b>N</b> |
| <i>If no, indicate net income (Line 236) of spouse or common-law partner.</i>  |          |          |
| <b>3. Did you separate, or become divorced, in 2019?</b>   | <b>Y</b> | <b>N</b> |
| If yes,  |          |          |
| a. Provide date of separation or divorce.  |          |          |
| b. Did you transfer any property to your spouse?   | <b>Y</b> | <b>N</b> |
| <i>If yes, describe any transfers made to spouse or separation.</i>  |          |          |
| c. Did you pay spousal or child support payments?  | <b>Y</b> | <b>N</b> |
| <i>If yes, provide details and copy of relevant agreements and amendments.</i>   |          |          |
| d. Did you receive spousal or child support payments?  | <b>Y</b> | <b>N</b> |
| <i>If yes, provide details and copy of relevant agreement and amendments.</i>  |          |          |
| <b>4. Do you have any children who were born in 2019?</b>  | <b>Y</b> | <b>N</b> |
| If yes, provide name, social insurance number, and date of birth of each new child.  |          |          |
| <b>5. Are there any persons dependent upon you because of their age or disability?</b>   | <b>Y</b> | <b>N</b> |
| If yes, provide name, address, social insurance number, date of birth, disability certificate, detail of infirmities, and income information for each dependent. |          |          |
| <b>6. Are you a Canadian citizen?</b>  | <b>Y</b> | <b>N</b> |
| If yes, do you authorize the CRA to provide information to Elections Canada?   |          |          |
|  | <b>Y</b> | <b>N</b> |



## PART II: INCOME AND GAINS

- |   |   |   |
|---|---|---|
| <b>7. Did you earn employment income?</b><br>If yes, provide T4 slips.  | Y | N |
| <b>8. Did you receive EI benefits?</b><br>If yes, provide T4E slips.  | Y | N |
| <b>9. Did you earn self-employed income?</b><br>If yes, provide income and expenses, including any gross income generated from internet webpages and websites (IWW) of the business.  | Y | N |
| <b>10. Did you receive interest, dividends or royalties?</b><br>If yes, provide T5 and T3 slips.  | Y | N |
| <b>11. Did you own any partnership interests?</b><br>If yes, provide T5013 slips, and details of original investment, income allocation, contributions and distributions.   | Y | N |
| <b>12. Did you own any rental properties?</b><br>If yes, provide the following for each property: address, original cost, and details of rental income and expenses.  | Y | N |
| <b>13. Did you sell or transfer shares, bonds, real estate or other properties?</b><br>If yes,<br>a. Provide details of original cost, selling price, and cost of disposition.<br>b. Was it made to a related individual or corporation?<br><i>If yes, provide identity of the related individual or corporation.</i> | Y | N |
| <b>14. Did you sell your principal residence?</b><br>If yes,<br>a. Provide sale proceeds, cost of property, and disposition costs.<br>b. Do you wish to claim the principal residence exemption?  | Y | N |
| <b>15. Did you receive pension income, or withdraw from RRSP, RRIF or RDSP?</b><br>If yes, provide T4A(OAS), T4A(P), T4A, T4RRSP, T4RRIF slips.   | Y | N |
| <b>16. Did you receive workers' compensation or social assistance?</b><br>If yes, provide T5007 slips.  | Y | N |
| <b>17. Did you receive any other income?</b><br>If yes, provide details of income received.   | Y | N |



### PART III: DEDUCTIONS AND CREDITS

- |  |   |   |
|--|---|---|
| <b>18. Did you incur employment expenses?</b><br>If yes, provide details of automobile, travel, parking, meals, etc., and copy of form T2200 signed by employer (required).      | Y | N |
| <b>19. Did you contribute to an RRSP/PRPP?</b><br>If yes, provide RRSP/PRPP receipts.  | Y | N |
| <b>20. Did you incur childcare expenses?</b><br>If yes, provide receipts, and details of daycare, camp, nanny costs (including name, SIN and other details of service provider). | Y | N |
| <b>21. Did you repay under the Home Buyers Plan or Lifelong Learning Plan?</b><br>If yes, provide details of repayment, and a copy of plan.                                      | Y | N |
| <b>22. Did you pay professional, union or similar dues?</b><br>If yes, provide professional due receipts.  | Y | N |
| <b>23. Did you pay examination fees to obtain a recognized professional status or tradesperson license?</b><br>If yes, provide examination fee receipts.                         | Y | N |
| <b>24. Did you incur any debts for investment or business purposes?</b><br>If yes, provide purpose of the loan and the interest paid.  | Y | N |
| <b>25. Did you incur accounting, investment counsel or management fees?</b><br>If yes, provide amounts paid. <i>(Note: Do not include RRSP fees)</i>                             | Y | N |
| <b>26. Did you (or a dependent) study at a university or college?</b><br>If yes, provide T2202 slips or form TL11A (for foreign universities).                                   | Y | N |
| <b>27. Did you (or a dependent) pay student loan interest?</b><br>If yes, provide details and amount of interest paid.   | Y | N |
| <b>28. Did you make charitable donations or political contributions?</b><br>If yes, provide official donation and contribution receipts.   | Y | N |
| <b>29. Did you (or a dependant) incur medical or attendant care expenses?</b><br>If yes, provide medical slips and receipts (annual summary from pharmacist preferred).          | Y | N |



## PART IV: FOREIGN REPORTING

- 30. Did you earn foreign employment income?** Y N  
If yes, provide details of foreign employment income earned and foreign taxes paid.
- 31. Did you earn income from foreign investments?** Y N  
If yes, provide details of foreign investment income earned and foreign taxes paid.
- 32. Did you receive foreign pension income?** Y N  
If yes, provide gross amount of foreign pension income received.
- 33. Did you own “specified foreign property” (SFP) at any time in the year?** Y N  
(See note below)  
If yes, was the total cost of all SFP more than CAD\$100,000?

If no, sign and date *Appendix A* on the following page.

*Note:*

“Specified foreign property” generally includes:

- Funds situated, deposited or held outside Canada;
- Tangible property situated outside of Canada;
- Shares of a non-resident corporation;
- Shares of corporations resident in Canada held by you or for you outside Canada;
- Interest in a non-resident trust;
- Interest in a partnership that holds a specified foreign property;
- Debt owed by a non-resident;
- Interest in a foreign insurance policy; and
- Precious metals, gold certificates, and futures contracts held outside Canada.

Specified foreign property does not include:

- Property used or held exclusively in carrying on an active business;
- Share or indebtedness of a foreign affiliate; and
- Personal-use property (e.g. Florida cottage used for personal enjoyment).



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**APPENDIX A**  
**REPRESENTATION RE: FOREIGN PROPERTY**

I, \_\_\_\_\_, confirm that at all times during the 2019 year, I did not own specified foreign property with a total cost of more than CAD\$100,000.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date