



PERSONAL TAX ORGANIZER 2020 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 2020 year.

Note: There are currently no tax filing extensions announced for the 2020 personal tax returns.

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

1. **Has your basic information (e.g. name, address) changed in 2020?**
If yes, provide details of new name, address, and other relevant information.
2. **Did you become married, or enter into a common-law relationship, in 2020?**
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 2020 tax return for your spouse or common-law partner?
If no, indicate net income (Line 23600) of spouse or common-law partner.
3. **Did you separate, or become divorced, in 2020?**
If yes,
 - a. Provide date of separation or divorce.
 - b. Did you transfer any property to your spouse?
If yes, describe any transfers made to spouse or separation.
 - c. Did you pay spousal or child support payments?
If yes, provide details and copy of relevant agreements and amendments.
 - d. Did you receive spousal or child support payments?
If yes, provide details and copy of relevant agreement and amendments.
4. **Do you have any children born in 2020?**
If yes, provide name, social insurance number, and date of birth of each new child.
5. **Are there persons dependent upon you because of their age or disability?**
If yes, provide name, address, social insurance number, date of birth, disability certificate, detail of infirmities, and income information for each dependent.
6. **Are you a Canadian citizen?**
If yes, do you authorize the CRA to provide information to Elections Canada?

PART II: INCOME AND GAINS

7. Did you receive any support under the COVID-19 relief programs?

(See note below)

If yes, provide tax slips and/or details of the amount and types of payment.

- a. Canada Emergency Response Benefit (CERB)
- b. Canada Recovery Benefit (CRB)
- c. Canada Recovery Sickness Benefit (CRSB)
- d. Canada Recovery Caregiving Benefit (CRCB)
- e. Canada Emergency Student Benefit (CESB)
- f. Canada Emergency Wage Subsidy (CEWS)
- g. Canada Emergency Rent Subsidy (CERS)
- h. Canada Emergency Business Account (CEBA)

Note for Question 7:

Please refer to our *ON TARGET* newsletter for further details on these Covid-19 measures.

8. Did you receive EI benefits?

If yes, provide T4E slips.

9. Did you earn employment income?

If yes, provide T4 slips.

10. Did you earn self-employed income?

If yes, provide income and expenses, including any gross income generated from internet webpages and websites (IWW) of the business.

11. Did you receive interest, dividends or royalties?

If yes, provide T5 and T3 slips.

12. Did you own any partnership interests?

If yes, provide T5013 slips, and details of original investment, income allocation, contributions and distributions.

13. Did you own any rental properties?

If yes, provide the following for each property: address, original cost, and details of rental income and expenses.

14. Did you sell or transfer shares, bonds, real estate or other properties?

If yes,

- a. Provide details of original cost, selling price, and cost of disposition.
- b. Was it made to a related individual or corporation?

If yes, provide identity of the related individual or corporation.



15. Did you sell your principal residence?

If yes,

- a. Provide sale proceeds, cost of property, and disposition costs.
- b. Do you wish to claim the principal residence exemption?

16. Did you receive pension income, or withdraw from RRSP, RRIF or RDSP?

If yes, provide T4A(OAS), T4A(P), T4A, T4RRSP, T4RRIF slips.

17. Did you receive workers' compensation or social assistance?

If yes, provide T5007 slips.

18. Did you receive any other income?

If yes, provide details of income received.

PART III: DEDUCTIONS AND CREDITS

19. Did you incur work-space-in-home expenses?

(See note below)

If yes, indicate which method you would like to use:

- a. Detailed method (must provide work space details and signed Form T2200)
- b. Simplified method

Note for Question 19:

Employees can claim home office expenses if the following conditions are met:

- They worked from home in 2020 due to the pandemic, *or* the employer required them to work from home; and
- They worked > 50% of the time from home for at least 4 consecutive weeks in 2020; and
- The expenses were used directly in their work during the period.

Employees can use the **detailed method** to claim actual expenses paid for the period that they worked from home. Under this method, employees must:

- Calculate the size of the work space,
- Keep supporting documents, and
- Obtain Form T2200 (or T2200S) from the employer.

Alternatively, for 2020 only, employees can use a **simplified method** (or the “**temporary flat rate method**”) to claim \$2 per day, up to a maximum of 200 days (or \$400 total). Under this method, employees do not have to provide details or obtain Form T2200 from the employer.

20. Did you incur any other employment expenses?

If yes, provide details of automobile, travel, parking, meals, etc., and signed Form T2200.



- 21. Did you contribute to an RRSP/PRPP?**

If yes, provide RRSP/PRPP receipts.
- 22. Did you incur childcare expenses?**

If yes, provide receipts, and details of daycare, camp, nanny costs (including name, SIN and other details of service provider).
- 23. Did you repay under the Home Buyers Plan or Lifelong Learning Plan?**

If yes, provide details of repayment, and a copy of plan.
- 24. Did you pay professional, union or similar dues?**

If yes, provide professional due receipts.
- 25. Did you pay examination fees to obtain a recognized professional status or tradesperson license?**

If yes, provide examination fee receipts.
- 26. Did you incur any debts for investment or business purposes?**

If yes, provide purpose of the loan and the interest paid.
- 27. Did you incur accounting, investment counsel or management fees?**

If yes, provide amounts paid. *(Note: Do not include RRSP fees)*
- 28. Did you (or a dependent) study at a university or college?**

If yes, provide T2202 slips or form TL11A (for foreign universities).
- 29. Did you (or a dependent) pay student loan interest?**

If yes, provide details and amount of interest paid.
- 30. Did you make charitable donations or political contributions?**

If yes, provide official donation and contribution receipts.
- 31. Did you (or a dependant) incur medical or attendant care expenses?**

If yes, provide medical slips and receipts (annual summary from pharmacist preferred).



PART IV: FOREIGN REPORTING

32. Did you earn foreign employment income?

If yes, provide details of foreign employment income earned and foreign taxes paid.

33. Did you earn income from foreign investments?

If yes, provide details of foreign investment income earned and foreign taxes paid.

34. Did you receive foreign pension income?

If yes, provide gross amount of foreign pension income received.

35. Did you own “specified foreign property” (SFP) at any time in 2020?

(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 for Question 35:

“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 2020 year, I did not own specified foreign property with a total cost of more than CAD\$100,000.

Signature

Date