



**PERSONAL TAX ORGANIZER  
2021 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 2021 year.

*Note: No tax filing extensions have been announced for the 2021 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

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|--|----------|----------|
| <b>1. Has your basic information (e.g. name, address) changed in 2021?</b><br>If yes, provide details of new name, address, and other relevant information.  | <b>Y</b> | <b>N</b> |
| <b>2. 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?  | <b>Y</b> | <b>N</b> |
| <b>3. Did you become married, or enter into a common-law relationship, in 2021?</b><br>If yes,<br>a. Provide date of marriage.<br>b. Provide name, SIN and date of birth of spouse or common-law partner.<br>c. Are we preparing a 2021 tax return for your spouse or common-law partner?<br><i>If no, indicate net income (Line 23600) of spouse or common-law partner.</i>   | <b>Y</b> | <b>N</b> |
| <b>4. Did you separate, or become divorced, in 2021?</b><br>If yes,<br>a. Provide date of separation or divorce.<br>b. Did you transfer any property to your spouse?<br><i>If yes, describe any transfers made to spouse or separation.</i><br>c. Did you pay spousal or child support payments?<br><i>If yes, provide details and copy of relevant agreements and amendments.</i><br>d. Did you receive spousal or child support payments?<br><i>If yes, provide details and copy of relevant agreement and amendments.</i> | <b>Y</b> | <b>N</b> |
| <b>5. Do you have any children born in 2021?</b><br>If yes, provide name, social insurance number, and date of birth of each new child.  | <b>Y</b> | <b>N</b> |
| <b>6. Are there persons dependent upon you because of their age or disability?</b><br>If yes, provide name, address, social insurance number, date of birth, disability certificate, detail of infirmities, and income information for each dependent.   | <b>Y</b> | <b>N</b> |
| <b>7. Are you a Canadian citizen?</b><br>If yes, do you authorize the CRA to provide information to Elections Canada?  | <b>Y</b> | <b>N</b> |



## PART II: INCOME AND GAINS

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|---|----------|----------|
| <b>8. Did you earn employment income?</b><br>If yes, provide T4 slips.  | <b>Y</b> | <b>N</b> |
| <b>9. Did you earn self-employed income?</b><br>If yes, provide income and expenses, including gross income generated from webpages.                                      | <b>Y</b> | <b>N</b> |
| <b>10. Did you receive any support under the COVID-19 relief programs in 2021?</b><br>If yes, provide T4A slips and/or details of the amount and types of payment.        | <b>Y</b> | <b>N</b> |
| a. Canada Recovery Benefit (CRB)  | <b>Y</b> | <b>N</b> |
| b. Canada Recovery Sickness Benefit (CRSB)  | <b>Y</b> | <b>N</b> |
| c. Canada Recovery Caregiving Benefit (CRCB)  | <b>Y</b> | <b>N</b> |
| d. Other (please indicate): _____   | <b>Y</b> | <b>N</b> |
| <b>11. 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.                           | <b>Y</b> | <b>N</b> |
| <b>12. Did you receive EI benefits?</b><br>If yes, provide T4E slips.   | <b>Y</b> | <b>N</b> |
| <b>13. Did you receive interest, dividends or royalties?</b><br>If yes, provide T5 and T3 slips.  | <b>Y</b> | <b>N</b> |
| <b>14. Did you own any partnership interests?</b><br>If yes, provide T5013 slips, and details of original investment, income allocation, contributions and distributions. | <b>Y</b> | <b>N</b> |
| <b>15. 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.      | <b>Y</b> | <b>N</b> |
| <b>16. Did you sell or transfer shares, bonds, real estate or other properties?</b><br>If yes,  | <b>Y</b> | <b>N</b> |
| a. Provide details of original cost, selling price, and cost of disposition.  |          |          |
| b. Was it made to a related individual or corporation?  | <b>Y</b> | <b>N</b> |
| <i>If yes, provide identity of the related individual or corporation.</i>   | <b>Y</b> | <b>N</b> |
| <b>17. Did you receive workers' compensation or social assistance?</b><br>If yes, provide T5007 slips.  |          |          |
| <b>18. Did you receive any other income?</b><br>If yes, provide details of income received.   | <b>Y</b> | <b>N</b> |



### PART III: DEDUCTIONS AND CREDITS

**19. Did you incur work-space-in-home expenses?** Y N  
If yes, circle the method to use: **Detailed method / Temporary flat rate method**

Note: As an employee, you can use the **detailed method** to claim actual expenses paid for the period that you worked from home. Under this method, you must:

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

Alternatively, if you worked more than 50% of the time from home for at least four consecutive weeks in 2021, you can use the **temporary flat rate method** to claim \$2 per day, up to a maximum of 250 days (or \$500 total). Under this method, you do not have to provide details or obtain T2200 from the employer.

**20. Did you incur any other employment expenses?** Y N  
If yes, provide details of automobile, travel, parking, meals, etc., and signed T2200.

**21. Did you contribute to an RRSP/PRPP?** Y N  
If yes, provide RRSP/PRPP receipts.

**22. Did you incur childcare expenses?** Y N  
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?** Y N  
If yes, provide details of repayment, and a copy of plan.

**24. Did you pay professional, union or similar dues?** Y N  
If yes, provide professional due receipts.

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

**26. Did you incur any debts for investment or business purposes?** Y N  
If yes, provide purpose of the loan and the interest paid.

**27. Did you incur accounting, investment counsel or management fees?** Y N  
If yes, provide amounts paid. (Note: Do not include fees on registered accounts)

**28. Did you (or a dependent) study at a university or college?** Y N  
If yes, provide T2202 slips or form TL11A (for foreign universities).



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|---|----------|----------|
| <b>29. Did you (or a dependent) pay student loan interest?</b><br>If yes, provide details and amount of interest paid.  | <b>Y</b> | <b>N</b> |
| <b>30. Did you make charitable donations or political contributions?</b><br>If yes, provide official donation and contribution receipts.                                | <b>Y</b> | <b>N</b> |
| <b>31. 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). | <b>Y</b> | <b>N</b> |

#### **PART IV: FOREIGN REPORTING**

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|---|----------|----------|
| <b>32. Did you earn foreign employment income?</b><br>If yes, provide details of foreign employment income earned and foreign taxes paid.       | <b>Y</b> | <b>N</b> |
| <b>33. Did you earn income from foreign investments?</b><br>If yes, provide details of foreign investment income earned and foreign taxes paid. | <b>Y</b> | <b>N</b> |
| <b>34. Did you receive foreign pension income?</b><br>If yes, provide gross amount of foreign pension income received.                          | <b>Y</b> | <b>N</b> |
| <b>35. Did you own “specified foreign property” (SFP) at any time in 2021?</b><br>If yes, was the total cost of all SFP more than CAD\$100,000? | <b>Y</b> | <b>N</b> |

**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 2021 year, I did not own specified foreign property with a total cost of more than CAD\$100,000.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date