

PERSONAL TAX ORGANIZER

VKO LLP provides the following personal tax organizer to assist with the preparation of personal tax returns. The following is not mandatory, however, if you wish to complete the organizer, please provide it with your personal tax documents. The following is intended to cover main aspects and common areas of a personal tax return. Should you have any questions in regards to an item not covered below, please contact our office.

1. PERSONAL INFORMATION

| | TAXPAYER 1 | TAXPAYER 2 (SPOUSE) |
|-----------|------------|---------------------|
| NAME | | |
| SIN | | |
| DOB | | |
| TELEPHONE | | |
| EMAIL | | |
| ADDRESS | | |

Marital Status: ___ Married ___ Single ___ Common-law ___ Separated ___ Divorced ___ Widowed

If marital status changes during the year, provide the date of change (dd/mm/yy): _____

2. RESIDENCE

Province or territory of residence on December 31: _____

Did you dispose of your principal residence during the year? If yes, provide the following details:

Address: _____

Year of Acquisition: _____

Proceeds of Disposition: _____

*Note: If the principal residence is not to be claimed for every year owned, please advise us.

3. FOREIGN REPORTING

Did either taxpayer or spouse own or hold foreign property with a total cost of more than \$100,000 CDN at anytime during the year?

Taxpayer 1: ___ Yes ___ No

Taxpayer 2: ___ Yes ___ No

If yes, provide details: _____

4. DEPENDENTS

| NAME | RELATIONSHIP | DOB (dd/mm/yy) | SIN | INCOME |
|------|--------------|----------------|-----|--------|
| | | | | |
| | | | | |
| | | | | |
| | | | | |

If any of the above dependents are disabled, please provide details:

5. GENERAL INCOME

Check if applicable

| | TAXPAYER 1 | TAXPAYER 2 (SPOUSE) |
|---------------------------|------------|---------------------|
| T4 SLIPS | | |
| T4A SLIPS | | |
| T4E SLIPS | | |
| T4A(P) SLIPS | | |
| T4A(OAS) SLIPS | | |
| T4RSP SLIPS | | |
| T4RIF SLIPS | | |
| T5007 SLIPS | | |
| Support payments received | | |

6. INVESTMENT INCOME

Check if applicable

| | TAXPAYER 1 | TAXPAYER 2 (SPOUSE) |
|----------------------|------------|---------------------|
| T3 SLIPS | | |
| T5 SLIPS | | |
| T5013/T5013(A) SLIPS | | |
| T5008 | | |
| T4PS SLIPS | | |

If you disposed of any investments during the year, please provide the following for each investment:

- Description
- Date acquired
- Original cost
- Proceeds from disposal
- Date of disposal
- Expenses related to the disposal

If you incurred expenses related to these investments such as management fees or interest, please provide backup for the amounts.

7. BUSINESS/FARMING/RENTAL INCOME

Did either taxpayer have business, farming or rental income during the year? If so, please provide the following:

- Schedule of revenues and expenses for the year
- Details/invoices for capital assets purchased or sold during the year
- Details of mileage
- Home expenses (utilities, property tax, mortgage interest, maintenance, rent expenses)
- Square footage of home office and total square footage of home
- Breakdown of inventory at December 31 (if applicable)

8. GENERAL DEDUCTIONS

Check if applicable. Please note that the following is not a complete and detailed list of deductions available. If you have any questions on a deduction, do not hesitate contacting our office.

| | TAXPAYER 1 | TAXPAYER 2 (SPOUSE) |
|--|------------|---------------------|
| RRSP contributions. | | |
| Amounts paid for union or professional dues. | | |
| List of child care expenses paid. | | |
| List of moving expenses paid. ^(a) | | |
| List of support payments paid. | | |
| List of deductible employment expenses. ^(b) | | |

- (a) Can only be claimed if you moved and established a new home for work purposes or to be a full-time student and your new home is at least 40km closer to your new work or school.
- (b) Must have a T2200 Declaration of Conditions of Employment form completed and signed by the employer.

9. CREDITS

Check if applicable. Please note that the following is not a complete and detailed list of tax credits available. If you have any questions on a tax credit, do not hesitate contacting our office.

| | TAXPAYER 1 | TAXPAYER 2 (SPOUSE) |
|--|------------|---------------------|
| Charitable donation slips | | |
| Political donation slips | | |
| Medical receipts | | |
| Interest on student loans ^(a) | | |
| Tuition tax credit with T2202A slip ^(b) | | |

- (a) Loan must be received under Canada Student Loans Act, Canada Student Financial Assistance Act or Apprentice Loans Act
- (b) If tuition credits are to be transferred, please complete and sign back of T2202A

NOTES
