



**ROWLAND, PARKER & ASSOCIATES LLP**  
 CHARTERED PROFESSIONAL ACCOUNTANTS

5013 - 49 Avenue Box 4008 Ponoka, AB T4J 1R5 (403) 783-3315

**PERSONAL TAX ORGANIZER**

(Please use this envelope to collect your Income Tax Information)

Name: \_\_\_\_\_ Birthdate: \_\_\_\_\_ SIN: \_\_\_\_\_

Spouse \_\_\_\_\_ Birthdate: \_\_\_\_\_ SIN: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Telephone Number: \_\_\_\_\_ (Days) \_\_\_\_\_ (Cell) Email Address: \_\_\_\_\_

**Dependants:**

**Filing a return? RPA to prepare?**

Name: _____	M/F	Birthdate: _____	SIN: _____	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Name: _____	M/F	Birthdate: _____	SIN: _____	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Name: _____	M/F	Birthdate: _____	SIN: _____	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Name: _____	M/F	Birthdate: _____	SIN: _____	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>

**Did you have a Change in Marital Status during 2015:** Yes  No   
 (Circle One) Marriage Separation Divorce Common-Law \_\_\_\_\_  
 Date of Change \_\_\_\_\_

Please answer the following: Yes No  
 Do you own assets outside of Canada that cost over \$100,000 (Canadian)?

If yes, please provide a brief description of assets: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Elections Canada Questions:

	Yes	No	Yes	No
Are you a Canadian Citizen?	<input type="checkbox"/>	<input type="checkbox"/>	Is Your Spouse a Cdn Citizen?	<input type="checkbox"/> <input type="checkbox"/>
If you are a Canadian Citizen, do you wish us to authorize CRA to update your information for the National Register of Electors			<input type="checkbox"/>	<input type="checkbox"/>

**FOLLOWING IS A CHECKLIST TO ASSIST YOU IN ORGANIZING YOUR INFORMATION.**

<p><b>Income:</b></p> <ul style="list-style-type: none"> <li>Mutual Funds and Trusts (T3) <input type="checkbox"/></li> <li>Employment Income (T4) <input type="checkbox"/></li> <li>Other Income (T4A) <input type="checkbox"/></li> <li>Scholarships/Bursary (T4A) <input type="checkbox"/></li> <li>Old Age Security (T4)(OAS) <input type="checkbox"/></li> <li>Canada Pension (T4 (P)) <input type="checkbox"/></li> <li>RRSP (T4 RSP) <input type="checkbox"/></li> <li>RRIF (T4 RIF) <input type="checkbox"/></li> <li>Employment Insurance (T4E) <input type="checkbox"/></li> <li>Interest &amp; Dividends (T5) <input type="checkbox"/></li> <li>Partnership Income (T5013) <input type="checkbox"/></li> <li>Social Assistance (T5007) <input type="checkbox"/></li> <li>Universal Child Care Benefit (RC62) <input type="checkbox"/></li> <li>Sales of Shares/Stocks <input type="checkbox"/></li> <li>Sales of Property (Real Estate) <input type="checkbox"/></li> <li>Alimony/Maintenance received <input type="checkbox"/></li> <li>Other Income <input type="checkbox"/></li> <li>US Social Security <input type="checkbox"/></li> <li>Foreign Pensions <input type="checkbox"/></li> </ul>	<p><b>Credits:</b></p> <ul style="list-style-type: none"> <li>Equivalent Dependant <input type="checkbox"/></li> <li>Post-Secondary Students - Bus Passes <input type="checkbox"/></li> <li>Child Fitness Credit Receipts <input type="checkbox"/></li> <li>Children's Arts Tax Credit <input type="checkbox"/></li> <li>Home Buyers Amount <input type="checkbox"/></li> <li>Adoption Expenses <input type="checkbox"/></li> <li>Caregiver Tax Credit <input type="checkbox"/></li> <li>Disability Credit <input type="checkbox"/></li> <li>Student Loan Interest <input type="checkbox"/></li> <li>Tuition Receipts (T2202A) <input type="checkbox"/></li> <li>Medical Expenses <input type="checkbox"/></li> <li>Donation Receipts <input type="checkbox"/></li> <li>Political Contributions <input type="checkbox"/></li> </ul> <p><b>Deductions:</b></p> <ul style="list-style-type: none"> <li>RRSP Contributions <input type="checkbox"/></li> <li>Union or Professional Dues <input type="checkbox"/></li> <li>Child Care Expenses <input type="checkbox"/></li> <li>Moving Expenses <input type="checkbox"/></li> <li>Alimony/Maintenance Paid <input type="checkbox"/></li> <li>Interest/Carrying Charges <input type="checkbox"/></li> <li>Investment Council Fees <input type="checkbox"/></li> <li>Employment Expenses (Signed T2200 Required) <input type="checkbox"/></li> <li>Trade Persons Tools <input type="checkbox"/></li> <li>Apprenticeship Tools <input type="checkbox"/></li> </ul>	<p><b>Other:</b></p> <ul style="list-style-type: none"> <li>Tax Instalments <input type="checkbox"/></li> <li>Home Buyers Plan Withdrawal <input type="checkbox"/></li> <li>In-home Care for Elderly/Infirm <input type="checkbox"/></li> <li>Volunteer Firefighter <input type="checkbox"/></li> </ul> <p><b>Farm/Rental/Business:</b></p> <ul style="list-style-type: none"> <li>Farm Income &amp; Expense <input type="checkbox"/></li> <li>Farm Inventory at Dec 31 <input type="checkbox"/></li> <li>Rental Income &amp; Expense <input type="checkbox"/></li> <li>Business Income &amp; Expense <input type="checkbox"/></li> <li>Capital Asset Additions &amp; Disposals (Invoices) <input type="checkbox"/></li> <li>New Oil &amp; Gas payment /leases received <input type="checkbox"/></li> <li>Right of Way Agreements <input type="checkbox"/></li> </ul> <p><b>GST Return:</b></p> <p>Are you filing a GST return <b>Yes No</b> for business, farm or rental? <input type="checkbox"/> <input type="checkbox"/></p> <p>RPA to prepare? <input type="checkbox"/> <input type="checkbox"/></p> <p>(If <b>yes</b> please ensure you provide our office with the forms you received from CRA)</p>
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**PLEASE ENCLOSE NOTICE OF ASSESSMENT FOR 2014 FOR EACH TAXPAYER**

NOTES FOR PREPARATION

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