



ROWLAND, PARKER & ASSOCIATES LLP
 CHARTERED PROFESSIONAL ACCOUNTANTS

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2017 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: _____

Changes in Dependants: **Filing a return?** **RPA to prepare?**
 Name: _____ M/F Birthdate: _____ SIN: _____ Yes No Yes No
 Name: _____ M/F Birthdate: _____ SIN: _____ Yes No Yes No

Did you have a Change in Marital Status during 2017: Yes No
 (Circle One) Marriage Separation Divorce Common-Law _____
Date of Change

Are you registered for Direct Deposit? Yes No If not, or if you have you had a change in your Direct Deposit account, please provide banking details and we can update your banking information with CRA.

Did you sell your PRINCIPAL residence (home/cottage) in 2017? If so, please provide details regarding the sale.

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: _____

Disability Credit

Do you or an immediate family member have any restriction in day to day living, either Mentally or Physically?
 Yes No

If yes, please provide us with details as you may be eligible to apply for the disability credit and we can discuss this with you further _____

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

<p>Income:</p> <ul style="list-style-type: none"> Mutual Funds and Trusts (T3) <input type="checkbox"/> Employment Income (T4) <input type="checkbox"/> Other Income (T4A) <input type="checkbox"/> Scholarships/Bursary (T4A) <input type="checkbox"/> Old Age Security (T4)(OAS) <input type="checkbox"/> Canada Pension (T4A (P)) <input type="checkbox"/> RRSP (T4 RSP) <input type="checkbox"/> RRIF (T4 RIF) <input type="checkbox"/> Employment Insurance (T4E) <input type="checkbox"/> Interest & Dividends (T5) <input type="checkbox"/> Partnership Income (T5013) <input type="checkbox"/> Social Assistance (T5007) <input type="checkbox"/> Sales of Shares/Stocks <input type="checkbox"/> Sales of Property (Real Estate) <input type="checkbox"/> Alimony/Maintenance received <input type="checkbox"/> US Social Security <input type="checkbox"/> Foreign Pensions <input type="checkbox"/> Other Income <input type="checkbox"/> 	<p>Credits:</p> <ul style="list-style-type: none"> Equivalent Dependant <input type="checkbox"/> Teacher/ECE School Supply Credit <input type="checkbox"/> Home Buyers Amount <input type="checkbox"/> Adoption Expenses <input type="checkbox"/> Caregiver Tax Credit <input type="checkbox"/> Disability Credit <input type="checkbox"/> Home Accessibility Credit <input type="checkbox"/> Student Loan Interest <input type="checkbox"/> Tuition Receipts (T2202A) <input type="checkbox"/> (**Note: if wish to transfer credit from child, child must sign T2202) Medical Expenses <input type="checkbox"/> Donation Receipts <input type="checkbox"/> Political Contributions <input type="checkbox"/> <p>Deductions:</p> <ul style="list-style-type: none"> RRSP Contributions <input type="checkbox"/> Union or Professional Dues <input type="checkbox"/> Child Care Expenses <input type="checkbox"/> Moving Expenses <input type="checkbox"/> Alimony/Maintenance Paid <input type="checkbox"/> Interest/Carrying Charges <input type="checkbox"/> Investment Council Fees <input type="checkbox"/> Employment Expenses (Signed T2200 Required) <input type="checkbox"/> Trade Persons Tools <input type="checkbox"/> Apprenticeship Tools <input type="checkbox"/> 	<p>Other:</p> <ul style="list-style-type: none"> Home Buyers Plan Withdrawal <input type="checkbox"/> Volunteer Firefighter <input type="checkbox"/> <p>Farm/Rental/Business:</p> <ul style="list-style-type: none"> Farm Income & Expense <input type="checkbox"/> Farm Inventory at Dec 31 <input type="checkbox"/> Rental Income & Expense <input type="checkbox"/> Business Income & Expense <input type="checkbox"/> Capital Asset Additions & Disposals (Invoices) <input type="checkbox"/> New Oil & Gas payment /leases received <input type="checkbox"/> Right of Way Agreements <input type="checkbox"/> <p>GST Return:</p> <p>Are you filing a GST return Yes No for business, farm or rental? <input type="checkbox"/> <input type="checkbox"/></p> <p>RPA to prepare? <input type="checkbox"/> <input type="checkbox"/> (If yes please ensure you provide our office with the forms you received from CRA)</p>
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NOTES FOR PREPARATION
