



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

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

**2018 PERSONAL TAX ORGANIZER**

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

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

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

**CHANGES??** (Complete following if any changes)

Mailing Address: _____	
Telephone Number: _____ (Days) (Cell)	Email Address: _____
<b>Dependants:</b>	<b>Filing a return? RPA to prepare?</b>
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"/>
<b>Did you have a Change in Marital Status during 2018:</b> Yes <input type="checkbox"/> No <input type="checkbox"/> <b>If Yes, Date of Change</b>	
(Circle One) Marriage Separation Divorce Common-Law _____	

<b>Direct Deposit</b>	Are you registered for Direct Deposit? Yes <input type="checkbox"/> No <input type="checkbox"/> If you wish to register, or you have you had a change in your Direct Deposit account, please enclose void cheque or printout from bank with banking details and we will update your banking information with CRA.
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<b>Principal Residence</b>	If you disposed of, or changed the use of, your PRINCIPAL residence (home/cottage) during 2018 please enclose copies of the sale document for the disposed of property in order for us to report it correctly.
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<b>Foreign Property</b>	Do you own assets outside of Canada that cost over \$100,000 (Canadian) Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, please provide a brief description of assets: _____ _____
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<b>Disability Tax Credit</b>	If you or an immediate family member have any restriction in day to day living, either mentally or physically, please provide us with details as you may be eligible to apply for the disability credit and we can discuss this with you further. _____ _____
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**FOLLOWING IS A CHECKLIST TO ASSIST YOU IN ORGANIZING YOUR INFORMATION.**

<u>Income:</u>	<u>Credits:</u>	<u>Other:</u>
Mutual Funds and Trusts (T3) <input type="checkbox"/>	Eligible Dependant <input type="checkbox"/>	Home Buyers Plan Withdrawal <input type="checkbox"/>
Employment Income (T4) <input type="checkbox"/>	Teacher/ECE School Supply Credit <input type="checkbox"/>	Volunteer Firefighter <input type="checkbox"/>
Other Income (T4A) <input type="checkbox"/>	Home Buyers Amount <input type="checkbox"/>	
Scholarships/Bursary (T4A) <input type="checkbox"/>	Adoption Expenses <input type="checkbox"/>	<b>Farm/Rental/Business:</b>
Old Age Security (T4)(OAS) <input type="checkbox"/>	Caregiver Tax Credit <input type="checkbox"/>	Farm Income & Expenses <input type="checkbox"/>
Canada Pension (T4A (P)) <input type="checkbox"/>	Disability Credit <input type="checkbox"/>	Farm Inventory at Dec 31 <input type="checkbox"/>
RRSP (T4 RSP) <input type="checkbox"/>	Home Accessibility Credit <input type="checkbox"/>	Rental Income & Expense <input type="checkbox"/>
RRIF (T4 RIF) <input type="checkbox"/>	Student Loan Interest <input type="checkbox"/>	Business Income & Expense <input type="checkbox"/>
Employment Insurance (T4E) <input type="checkbox"/>	Tuition Receipts (T2202A) <input type="checkbox"/>	Capital Asset Additions & Disposals (Invoices) <input type="checkbox"/>
Interest & Dividends (T5) <input type="checkbox"/>	(*Note: if wish to transfer credit from child, child must sign T2202)	New Oil & Gas leases, easements, right of way agreements <input type="checkbox"/>
Partnership Income (T5013) <input type="checkbox"/>	Medical Expenses <input type="checkbox"/>	
Social Assistance (T5007) <input type="checkbox"/>	Donation Receipts <input type="checkbox"/>	<b>GST Return:</b>
Sales of Shares/Stocks <input type="checkbox"/>	Political Contributions <input type="checkbox"/>	Are you filing a GST return <b>Yes No</b> for business, farm or rental? <input type="checkbox"/> <input type="checkbox"/>
Sales of Property (Real Estate) <input type="checkbox"/>		RPA to prepare? <input type="checkbox"/> <input type="checkbox"/>
Alimony/Maintenance received <input type="checkbox"/>	<b>Deductions:</b>	(If <b>yes</b> please ensure you provide our office with the forms you received from CRA)
US Social Security <input type="checkbox"/>	RRSP Contributions <input type="checkbox"/>	
Foreign Pensions <input type="checkbox"/>	Union or Professional Dues <input type="checkbox"/>	
Other Income <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"/>	

**NOTES FOR PREPARATION**

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