ROWLAND, PARKER & ASSOCIATES LLP
CHARTERED PROFESSIONAL ACCOUNTANTS

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

2019 PERSONAL TAX ORGANIZER

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

Name: ________________________________ Birthdate:_______________ SIN: ___________________

Spouse ________________________________ Birthdate: ______________ SIN: ___________________

CHANGES?? *(ONLY COMPLETE if any changes)*

Mailing Address:____

Telephone Number:____________ ____________ Email Address:___________________________
(Days) (Cell)

***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 2019: Yes ☐ No ☐ ***If Yes, Date of Change***
(Circle One) Marriage Separation Divorce Common-Law ________________________

Direct Deposit	Are you registered for Direct Deposit? Yes ☐ No ☐ If you wish to register, or you wish to change your Direct Deposit account, please enclose void cheque or printout from bank with banking details and we will update your banking information with CRA.

Principal Residence	If you disposed of, or changed the use of, your PRINCIPAL residence (home/cottage) during 2019 please enclose copies of the sale document for the disposed of property in order for us to report it correctly.

Foreign Property	Do you own assets outside of Canada that cost over $100,000 (Canadian) Yes ☐ No ☐ If yes, please provide a brief description of assets: ____ ____

Disability Tax Credit	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. ____ ____

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

Income:

- Mutual Funds and Trusts (T3) ☐
- Employment Income (T4) ☐
- Other Income (T4A) ☐
- Scholarships/Bursary (T4A) ☐
- Old Age Security (T4)(OAS) ☐
- Canada Pension (T4A (P)) ☐
- RRSP (T4 RSP) ☐
- RRIF (T4 RIF) ☐
- Employment Insurance (T4E) ☐
- Interest & Dividends (T5) ☐
- Partnership Income (T5013) ☐
- Social Assistance (T5007) ☐
- Sales of Shares/Stocks ☐
- Sales of Property (Real Estate) ☐
- Alimony/Maintenance received ☐
- US Social Security ☐
- Foreign Pensions ☐
- Other Income ☐

Credits:

- Eligible Dependant ☐
- Teacher/ECE School Supply Credit ☐
- Home Buyers Amount ☐
- Adoption Expenses ☐
- Caregiver Tax Credit ☐
- Disability Credit ☐
- Home Accessibility Credit ☐
- Student Loan Interest ☐
- Tuition Receipts (T2202A) ☐
- *(**Note: if wish to transfer credit from child, child must sign T2202)*
- Medical Expenses ☐
- Donation Receipts ☐
- Political Contributions ☐

Deductions:

- RRSP Contributions ☐
- Union or Professional Dues ☐
- Child Care Expenses ☐
- Moving Expenses ☐
- Alimony/Maintenance Paid ☐
- Interest/Carrying Charges ☐
- Investment Council Fees ☐
- Employment Expenses *(Signed T2200 Required)* ☐
- Trade Persons Tools ☐
- Apprenticeship Tools ☐

Other:

- Home Buyers Plan Withdrawal ☐
- Volunteer Firefighter ☐

Farm/Rental/Business:

- Farm Income & Expenses ☐
- Farm Inventory at Dec 31 ☐
- Rental Income & Expense ☐
- Business Income & Expense ☐
- Capital Asset Additions & Disposals (Invoices) ☐
- New Oil & Gas leases, easements, right of way agreements ☐

GST Return:

	Yes	***No***
Are you filing a GST return for business, farm or rental?	☐	☐
RPA to prepare?	☐	☐

(If ***yes*** please ensure you provide our office with the forms you received from CRA)

NOTES FOR PREPARATION

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