



ROWLAND, PARKER & ASSOCIATES LLP
 CHARTERED PROFESSIONAL ACCOUNTANTS

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

2016 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

<p>Did you have a Change in Marital Status during 2016: Yes <input type="checkbox"/> No <input type="checkbox"/> (Circle One) Marriage Separation Divorce Common-Law _____ Date of Change</p>
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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 2016? If so, please provide details regarding the sale.

Please answer the following:

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

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.

<u>Income:</u>	<u>Credits:</u>	<u>Other:</u>
Mutual Funds and Trusts (T3) <input type="checkbox"/>	Equivalent Dependant <input type="checkbox"/>	Home Buyers Plan Withdrawal <input type="checkbox"/>
Employment Income (T4) <input type="checkbox"/>	Post-Secondary Students - <input type="checkbox"/>	In-home Care for Elderly/Infirm <input type="checkbox"/>
Other Income (T4A) <input type="checkbox"/>	Bus Passes <input type="checkbox"/>	Volunteer Firefighter <input type="checkbox"/>
Scholarships/Bursary (T4A) <input type="checkbox"/>	Child Fitness Credit Receipts <input type="checkbox"/>	
Old Age Security (T4)(OAS) <input type="checkbox"/>	Children's Arts Tax Credit <input type="checkbox"/>	Farm/Rental/Business:
Canada Pension (T4A (P)) <input type="checkbox"/>	Teacher/ECE School Supply Credit <input type="checkbox"/>	Farm Income & Expense <input type="checkbox"/>
RRSP (T4 RSP) <input type="checkbox"/>	Home Buyers Amount <input type="checkbox"/>	Farm Inventory at Dec 31 <input type="checkbox"/>
RRIF (T4 RIF) <input type="checkbox"/>	Adoption Expenses <input type="checkbox"/>	Rental Income & Expense <input type="checkbox"/>
Employment Insurance (T4E) <input type="checkbox"/>	Caregiver Tax Credit <input type="checkbox"/>	Business Income & Expense <input type="checkbox"/>
Interest & Dividends (T5) <input type="checkbox"/>	Disability Credit <input type="checkbox"/>	Capital Asset Additions & Disposals (Invoices) <input type="checkbox"/>
Partnership Income (T5013) <input type="checkbox"/>	Student Loan Interest <input type="checkbox"/>	New Oil & Gas payment /leases received <input type="checkbox"/>
Social Assistance (T5007) <input type="checkbox"/>	Tuition Receipts (T2202A) <input type="checkbox"/>	Right of Way Agreements <input type="checkbox"/>
Universal Child Care Benefit (RC62) <input type="checkbox"/>	Medical Expenses <input type="checkbox"/>	
Sales of Shares/Stocks <input type="checkbox"/>	Donation Receipts <input type="checkbox"/>	GST Return:
Sales of Property (Real Estate) <input type="checkbox"/>	Political Contributions <input type="checkbox"/>	Are you filing a GST return Yes No for business, farm or rental? <input type="checkbox"/> <input type="checkbox"/>
Alimony/Maintenance received <input type="checkbox"/>	Deductions:	RPA to prepare? <input type="checkbox"/> <input type="checkbox"/>
Other Income <input type="checkbox"/>	RRSP Contributions <input type="checkbox"/>	(If yes please ensure you provide our office with the forms you received from CRA)
US Social Security <input type="checkbox"/>	Union or Professional Dues <input type="checkbox"/>	
Foreign Pensions <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
