



Tax Organization Checklist Part 1 of 4

Required Information *

* Are you a first-time client to PTC Canada? Yes No

If **Yes**, how did you find out about PTC Canada? (referred, where, when, how?)

Personal Information

* **Tax years to be filed** (we recommend doing a separate checklist for each year to be filed)

Full Name

Name used in tax year filed

* Social Insurance Number

* **Mailing address:**

Apt. # - Street # Street Name (if moving soon use new address)

P.O. Box

R.R.

City

Province

Postal Code

Home address (if different from above):

Apt. # - Street # Street Name (if moving soon use new address)

City

Province

Postal Code

Telephone Numbers:

Home

Work

Cell

Other

Fax

Email 1 :

Email 2 :

Web URL :

* **Marital Status**

Single

Married

Living common-law

Widowed

Divorced

Separated

If married or living common-law and not filing together, please include your spouse's Name, Social Insurance Number, and Net Income (line 236 of their return)

Spouse's Full Name

Spouse's Social Insurance Number

Spouse's Net Income (line 236)

* Date of Birth

* Were you or your spouse self-employed at any time this tax year? Yes No If **Yes**, in which Province

* Were you involved in bankruptcy? Yes No If **Yes** - please enter dates Entrance Date and/or Discharge Date

* Is the taxpayer deceased? Yes No If **Yes**, date of death Details:

* Did you leave or re-enter Canada this year? Yes No If **Yes** - please enter dates Departure Date and/or Entrance Date

* Do you wish to have your name added to the voters' list through your tax return? Yes No

* Are you applying for the GST credit? Yes No

* Do you have any children/dependants under 19 or 19 and older certified infirm by a doctor? Yes No If **Yes** - please enter their info below

Dependant Full Name

SIN

Net Income (line 236)

Dependant Full Name

SIN

Net Income (line 236)

Dependant Full Name

SIN

Net Income (line 236)

Dependant Full Name

SIN

Net Income (line 236)

If they require a tax return completed by us, please have them use a separate PTC Canada checklist

* Do you own foreign property worth over \$100,000 Canadian? Yes No

Please tell us any other personal information we may need.

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Income

What are the sources of your income? Please note, this includes income from all over the world, not just Canada.

- 1. Employment
- 2. Sales or commissions
- 3. Odd jobs, casual labour, tips
- 4. Old Age Security Pension
- 5. Canada or Quebec Pension Plan
- 6. Other pensions or superannuation
- 7. Disability benefits
- 8. Employment insurance benefits
- 9. Taxable dividends from Canadian corporations
- 10. Interest or investment income
- 11. Income/losses from a limited/non-active partnership
- 12. Taxable capital gains
- 13. Support payments received
- 14. RRSP income
- 15. Workers' compensation income
- 16. Social assistance
- 17. Net Federal Supplements

* 18. Did you start, participate in, or end a **business(es), rental property(ies), farm(s), fishing operation(s), or profession(s)** of which you were either a **sole proprietor, partner, or co-owner**? Yes No If **Yes**, please make selection and state the applicable partners' names, social insurance numbers, mailing addresses, and percentage of activity level (from 1% to 100%).

Involvement	Business	Type	Partners Name and Mailing Address	SIN	Activity
			<input type="text"/>	<input type="text"/>	<input type="text"/> %
Additional lines if more than one partner is involved	}		<input type="text"/>	<input type="text"/>	<input type="text"/> %
			<input type="text"/>	<input type="text"/>	<input type="text"/> %
			<input type="text"/>	<input type="text"/>	<input type="text"/> %
Additional lines if more than one partner is involved	}		<input type="text"/>	<input type="text"/>	<input type="text"/> %
			<input type="text"/>	<input type="text"/>	<input type="text"/> %
			<input type="text"/>	<input type="text"/>	<input type="text"/> %
Additional lines if more than one partner is involved	}		<input type="text"/>	<input type="text"/>	<input type="text"/> %
			<input type="text"/>	<input type="text"/>	<input type="text"/> %
			<input type="text"/>	<input type="text"/>	<input type="text"/> %

- 19. Foreign income
- 20. Any other income we need to know about.

Please note: If you had income but were not issued a T-slip for it, you must discuss this with the issuer.
As a taxpayer, you, not your income provider, PTC Canada, or CRA, are ultimately responsible for researching, tabulating, and reporting all your income.

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Deductions from Income

Which of the following deductions apply to you?

- | | |
|--|--------------------------|
| <input type="checkbox"/> 1. Registered Pension Plan contributions not on T4 slips | <input type="checkbox"/> |
| <input type="checkbox"/> 2. RRSPs | <input type="checkbox"/> |
| <input type="checkbox"/> 3. Saskatchewan Pension Plan | <input type="checkbox"/> |
| <input type="checkbox"/> 4. Annual union or professional dues | <input type="checkbox"/> |
| <input type="checkbox"/> 5. Universal Child Care Benefit (UCCB) repayment | <input type="checkbox"/> |
| <input type="checkbox"/> 6. Child care expenses | <input type="checkbox"/> |
| <input type="checkbox"/> 7. Child fitness tax credit | <input type="checkbox"/> |
| <input type="checkbox"/> 8. Attendant Care expenses | <input type="checkbox"/> |
| <input type="checkbox"/> 9. Live-in dependants under 18 or over 65 | <input type="checkbox"/> |
| <input type="checkbox"/> 10. Business investment losses | <input type="checkbox"/> |
| <input type="checkbox"/> 11. Moving expenses or any carried over from last year | <input type="checkbox"/> |
| <input type="checkbox"/> 12. Spousal or child support payments made | <input type="checkbox"/> |
| <input type="checkbox"/> 13. Carrying charges and interest expenses | <input type="checkbox"/> |
| <input type="checkbox"/> 14. Exploration and development expenses | <input type="checkbox"/> |
| <input type="checkbox"/> 15. Authorized employment expenses | <input type="checkbox"/> |
| <input type="checkbox"/> 16. Cleric's residence deduction | <input type="checkbox"/> |
| <input type="checkbox"/> 17. Canadian Forces personnel and police deduction | <input type="checkbox"/> |
| <input type="checkbox"/> 18. Canada employment amount | <input type="checkbox"/> |
| <input type="checkbox"/> 19. Employee home-relocation deduction | <input type="checkbox"/> |
| <input type="checkbox"/> 20. Stock options and shares deductions | <input type="checkbox"/> |
| <input type="checkbox"/> 21. Limited losses of other years' deductions | <input type="checkbox"/> |
| <input type="checkbox"/> 22. Non-capital losses of other years | <input type="checkbox"/> |
| <input type="checkbox"/> 23. Net capital losses of other years | <input type="checkbox"/> |
| <input type="checkbox"/> 24. Capital gains deductions | <input type="checkbox"/> |
| <input type="checkbox"/> 25. Northern residence deduction | <input type="checkbox"/> |
| <input type="checkbox"/> 26. Disability claim | <input type="checkbox"/> |
| <input type="checkbox"/> 27. Interest paid on student loan this year and interest paid in previous years not claimed | <input type="checkbox"/> |
| <input type="checkbox"/> 28. Tuition amounts claimed by student/taxpayer and any amount carried over from previous years | <input type="checkbox"/> |
| <input type="checkbox"/> 29. Tuition amount transferred by parent | <input type="checkbox"/> |
| <input type="checkbox"/> 30. Amounts transferred from your spouse | <input type="checkbox"/> |
| <input type="checkbox"/> 31. Medical expenses not covered by a drug plan | <input type="checkbox"/> |
| <input type="checkbox"/> 32. Public transit passes | <input type="checkbox"/> |
| <input type="checkbox"/> 33. Donations not claimed up to 5 years | <input type="checkbox"/> |
| <input type="checkbox"/> 34. Tax paid by instalments in advance | <input type="checkbox"/> |
| <input type="checkbox"/> 35. Federal or provincial tax credits | <input type="checkbox"/> |
| <input type="checkbox"/> 36. Losses or any other deductions carried over from last year | <input type="checkbox"/> |
| <input type="checkbox"/> 37. Any other deduction you feel we should know about | <input type="checkbox"/> |

Please note: If you had income but were not issued a T-slip for it, you must discuss this with the issuer.

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Miscellaneous

A. For the completion of your return, please review the following:

1. Would you like direct deposit of your refund, GST payment, or child tax benefits? Yes No
2. Are you planning to enclose any payment to CRA with this return? Yes No

B. One of the services PTC Canada offers is assistance with negotiations with CCRC and any challenges you may face with your taxes. All answers to the following questions will be kept strictly confidential! If you would prefer to speak to us directly, please indicate below.

1. Do you currently have a debt outstanding with CRA that you would like to discuss? Yes No
2. Do you currently have any outstanding issues with CRA? Yes No
3. Have you ever been audited? Yes No If yes, how many times and when?

Prefer to discuss with you in person

C. PTC Canada's growth has been largely due to clients referring their friends, family, and associates. PTC Canada pays referral bonuses and awards discount fees upon completion of a new client's return. We invite you to take advantage of this.

1. Do you know someone who might require our assistance or services? Yes No

If yes, please provide name, phone number, relationship, and details.

May we use your name when contacting this person? Yes No

D. Please enclose the following information with these documents and all your receipts:

- 1. Last year's tax return
- 2. Signed consent form (T1013). If you do not have this, we can provide it.
- 3. Spouse's or common law spouse's tax information
- 4. Dependants' tax information
- 5. Anything else you feel we should know about

Use this area for any other information or comments you may have.

Please note: Tips on this form or web page are for information only and are not legal advice.

Those seeking legal advice must obtain counsel from professionals practicing in that field. **PTC Canada will not be held responsible for any liability incurred by anyone using this information form or web page.**