Howland Tax Services *International*

2011 Personal Tax Organizer (Canada)

Personal Information

You	Your Spouse
Name	Name
Social Insurance #	Social Insurance #
Address	Address (if different)
Postal Code	Postal Code
Phone/Fax	Phone/Fax
Email	Email
Canadian Citizen? ☐ Yes ☐ No	Canadian Citizen? ☐ Yes ☐ No

New Clients

You		Your Spouse	
Birth Date		Birth Date	
Marital Status			
☐ Single	☐ Married	☐ Common-Law	
☐ Divorced	☐ Separated	☐ Widowed	

New clients please provide copies of the last tax returns filed.

All Clients

Do you want to <u>start</u> or <u>change</u> Direct Deposit of refunds into your bank account (income tax refunds, GST/HST Credits, Canada Child Tax Benefits, or Universal Child Tax Benefits)? If yes, provide the following information (or attach a VOID cheque to your tax return when completed):

Branch Number ____________________

Institution Number ____________________

Account Number ____________________

Do you want to eFile your return to speed up processing? ☐ Yes ☐ No

Did your marital status change during the year? ☐ Yes ☐ No

If yes, indicate date of change. ____________________

If you are married or living common-law and we are not preparing your spouse's return, please provide your spouse's name, Social Insurance Number, and net income from Line 236 of the spouse's income tax return.

Name: ____________________ SIN: ____________________ Net Income: ______________

Dependant Information				
Name				
Birth Date				
Relationship				
Social Insurance #				
Net Income				

Did you receive the Canada Child Tax Benefit (CCTB) for any of your children in 2011?

☐ Yes ☐ No

Did you pay childcare expenses in 2011? ☐ Yes ☐ No

If yes, please provide details, including Social Insurance Numbers of individual daycare providers:

______________________ ______________________

______________________ ______________________

______________________ ______________________

Do you authorize Canada Revenue Agency to provide your name, address, and date of birth to Elections Canada for the National Register of Electors?

☐ Yes ☐ No

Did you own foreign property at any time in 2011 with a total cost of more than $100,000 CAD?

☐ Yes ☐ No

If yes, please provide details:

Cost of property ______________________ ______________________

Type of property ______________________ ______________________

Location of property ______________________ ______________________

Did you immigrate to or emigrate from Canada during 2011? ☐ Yes ☐ No

If yes, indicate date of change of residency ______________________

Miscellaneous Credits

New: Volunteer Firefighters' Amount

Were you were a volunteer firefighter during the year? ◻ Yes ◻ No

If yes, did you complete at least 200 hours of eligible volunteer firefighting services with one or more fire departments during the year? ☐ Yes ☐ No

New: Children's Arts Amount

Your child must have been under 16 years old (under 18 if eligible for disability amount) at the beginning of 2011.

Did you pay fees in 2011 relating to the cost of registration or membership of your child in a program of artistic, cultural, recreational, or developmental activity?

(If yes, provide receipts) ☐ Yes ☐ No

Children's Fitness Amount

Your child must have been under 16 years old (under 18 if eligible for disability amount) at the beginning of 2011. The program must have been ongoing (a minimum of eight consecutive weeks duration or, in the case of children's camps, five consecutive days).

Did you pay fees in 2011 relating to the cost of registering your child in a program of physical activity (i.e. hockey, soccer, golf lessons, horse-back riding, sailing, bowling or others that require a similar level of activity)?

(If yes, provide receipts) ☐ Yes ☐ No

Public Transit Amount

Did you, your spouse, or child under 19 on Dec. 31, 2011 purchase public transit passes during 2011 that provide unlimited travel within Canada on local buses, streetcars, subways, commuter trains or buses, or local ferries?

(If yes, provide receipts) ☐ Yes ☐ No

Home Buyers' Amount

Did you or your spouse buy a new home during 2011? ◻ Yes ◻ No

If yes, did you live in another home owned by you or your spouse between Jan. 1, 2007 and Dec. 31, 2011?

☐ Yes ☐ No

U.S. Citizens

If we did not or will not prepare your U.S. returns, please provide copies. If you require U.S. tax preparation, please include W2, 1099, 1042S or other U.S. tax slips.

Did you have more than $10,000 (USD) in Canadian financial accounts (including bank, RRSP, or investment accounts) at any time during 2011? ☐ Yes ☐ No

If yes, Form TD F 90-22.1 must be filed with the U.S. Department of the Treasury by June 30, 2011 (received, not postmarked). If you want us to complete this form for you, please provide name and addresses of financial institutions, account numbers and types, and maximum values of each account during 2011 (in US dollars).

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Do you have a Canadian RRSP or RRIF? ☐ Yes ☐ No

If yes, provide name and addresses of financial institutions, account numbers, and closing value of each account on Dec. 31, 2011 (in CDN dollars) for preparation of IRS Form 8891.

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U.S. citizens who reside in Canada and earn self-employment income can elect not to pay U.S. Social Security Tax on that income by filing Form CPT56 *Certificate of Coverage Under the Canada Pension Plan* with their U.S. return. This form should be obtained well in advance. Please contact us as soon as possible.

New: Financial Assets Reporting Form

If you had foreign (non-US) financial assets in 2011, you may have to file the new Form 8938 with your return. There are different rules and amounts for married or unmarried taxpayers, and for taxpayers living inside or outside the United States.

We recommend that you visit the IRS website to determine if you are required to file Form 8938: <http://www.irs.gov/instructions/i8938/ch01.html#d0e211>

Are you required to file Form 8938? ☐ Yes ☐ No

If yes, and we are preparing your U.S. return, please provide statements for your financial assets so we can complete the form and attach it to your return.

Income & Expenses

Income Items

- ☐ T1204 - Government Service Payments
- ☐ T3 - Trust Income Allocation and Designations
- ☐ T4 - Statement of Remuneration Paid
- ☐ T4A - Pension, Retirement, Annuity and Other Income
- ☐ T4A(OAS) - Old Age Security
- ☐ T4A(P) - Canada Pension Plan
- ☐ T4E - Employment Insurance Benefits
- ☐ T4RSP - RRSP Income
- ☐ T4RIF - RRIF Income
- ☐ T5 - Investment Income
- ☐ T5008 - Securities Transactions
- ☐ T5013 - Partnership Income
- ☐ Foreign Pensions or U.S. Social Security
- ☐ Any other tax slips or income received

Deductible Items

- ☐ Public transit passes - provide receipts
- ☐ Children's Fitness Credit - provide receipts
- ☐ RRSP contribution receipts
- ☐ Charitable donation receipts
- ☐ Medical expenses - provide all receipts and reimbursements from medical plans
- ☐ Investment expenses and carrying charges (e.g. interest, investment counsel fees, safety deposit box fees, etc.)
- ☐ Tradesperson tools and expenses - provide receipts
- ☐ Tuition fees of more than $100 - obtain T2202A form or receipt from educational institution
- ☐ Student loan interest forms
- ☐ Moving expense receipts, if the move brought you 40 kms closer to workplace or school
- ☐ Union dues, provide receipts
- ☐ Employment expenses - Form T2200 required from employer

Also Provide

- ☐ Details of assets sold during the year (stocks and bonds sold outside RRSP, real estate, equipment, autos, etc.) with documentation of their cost
- ☐ Income and expenses from rental properties, business or partnership
- ☐ Contributions to federal and provincial political parties
- ☐ Details on alimony/maintenance received or paid
- ☐ Assessment notices and correspondence received from Canada Revenue Agency
- ☐ Receipts for tax paid by installments - total installments paid for 2011: ______________
- ☐ Mailing labels from Canada Revenue Agency

Anything else?

This Personal Tax Organizer is not a complete list. Please provide details regarding any other income or expenses not listed above.

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