Bottom Line Bookkeeping
& Tax Solutions Inc

TAX ORGANIZER FOR THE YEAR___

NAME: _ _ _ _ _ _ _ _ _ _ _ _ _ _ SPOUSE/PARTNER: ____________________

ADDRESS: ____

Date of Birth: ____________________ Date of Birth: ____________________

SIN:____________________ SIN

Names and dates of birth of dependant children: ____________________

Phones: H:_ _ _ _ _ _ _ B: _ _ _ _ _ _ _ _ _

Cell:______________Cell 2:_ _ _ _ _ _ _

Email:

Email 2:____

Marital Status____________________________

NOTE: If **we are not preparing the <u>Tax Return for your Spouse/Partner. we will reguire Their Net Income.</u>**

Information slips for the following Income:

1) Employment (T4) ( )
2) Pension (T4A) ( )
3) CPP/Old Age Security (T4A(P) ( ) (T4A(OAS)) ( )
4) Employment Insurance (T4U) ( )
5) Dividends (TS) ( )
6) Interest (T5/T600) ( )
7) RRSP, DPSP, RPP, *RRIF* ( )
8) Estate / Trusts (T3) ( )
9) Partnerships/Tax Shelters(T5013/T101)( )
10) Other ( )

Receipts for the following deductions:

11) RRSP contributions ( )
12) Union/professional dues ( )
13) Child care expenses ( )
14) Moving expenses ( )
15) Accounting/legal fees ( )
16) Investment Counsel Fees ( )
17) Safety deposit box rental ( )
18) Interest paid on investments ( )
19) Tuition fees/education deduction ( )
20) Medical/attendant care expenses ( )
21) Charitable donations ( )
22) Political donations ( )
23) Provincial tax credits ( )
24) Taxable benefits not on T4 ( )
25) Deductible employment expenses ( )
( )
27) Spousal /maintenance paid/received ( )
28) Canada Savings Bonds ( )
29) Foreign income/taxes ( )
30) Income tax Installments ( )
31) Rental income & expenses ( )
32) Business/professional income ( )
33) Self-employed commission income ( )
34) Farming or fishing income/expenses ( )
35) Other sources of income: ( )

***Documents* for the following transactions:**

36) Prior year assessment ( )
37) Real estate sales or purchases ( )
38) Stocks/bonds/mutual funds ( )
39) Commodity transactions ( )
40) Tax shelters ( )
41) Primary residence sale ( )
42) Student loan interest paid ( )
43) Other ( )

<u>Foreign Property reporting if "YES", please attach details:</u>

At any time in the fiscal year did you transfer or loan property to a non-resident trust? Yes No

Did you earn any income or realize any gains from foreign property in the fiscal year? Yes No

At any time in the fiscal year did you receive funds or property from, or were you indebted to, a non-resident corporation in which you have at least a 1% direct interest **<u>AND</u>** you, together with related persons, have at least a combined 10% interest? Yes No

Do you own, or did you acquire, foreign property(ies) with a total cost in excess of $100,000? Yes No

Are you the beneficiary of a foreign trust ? Yes No