

Personal Tax Organizer

Personal Information			Spouse Information			
Name:			Name:			
SIN Number:			SIN Number:			
Date of Birth: DD MM YYYY			Date of Birth: DD MM YYYY			
Phone Number:			Phone Number			
Email:			Email:			
Street Address:			Street Address:			
City, Province:			City, Province:			
Postal Code:			Postal Code:			
Marital Status: 🛚	Married □ Single	□ Common-law	√ 🗆 Separated 🗆] Divorced □ Wi	dowed	
Date Marital status	changed (if appli	cable)				
Province or territor	ry of residence on	December 31				
Are we preparing y	our spouse's retu	rn? Yes	No			
If no, please provid	e Net Income (Lin	e 23600)				
Dependar	nts Informat	ion				
Name	Date of Birth	Relationship	SIN Number	Net Income	DTC *	Post Seconda study
				* Fliaib	la far Di	icability Tay Ca
				* Eligit	ite for Di	sability Tax Cr
Mandator	y Questions	(Please Ch	neck if Yes)			
If this is your f	irst year filing wit	h us, please provi	ide a copy of your	prior year Pers	onal Tax	Return
☐ Are you a (Canadian Citizen?		Is your Spou	se a Canadian Ci	tizen?	
☐ Are you a US Citizen? ☐ Is your Spouse a US Citizen?						
☐ Do you owi	n/hold foreign pro	perty with a total	cost of more tha	n \$100,000 CAD?		
☐ Did you sel Real Estate	ll your principal re e)	esidence in the cu	rrent tax year? (i	f so, please comp	plete Sal	e of
	horize CRA to pro	vide information a	about you/your si	oouse to Election	s Canada	a?

☐ Do you want to register for online mail with the email address given above?