

MCLEAN BARTOK EDWARDS - PERSONAL TAX ORGANIZER

Name(s) _____

For the calendar year _____

Please complete this T1 Organizer and submit with your information slips and other supplemental information. Spouses can complete one form together or separately.

1. Deliverables

What format would you like to receive your return:

Paper Yes No

PDF Yes No

2. Personal Information

Best way to contact me:

Email: _____ Preferred

Phone: _____ Preferred

If your mailing address changed, please provide new address:

Marital status:

Married Single Common-law Separated Divorced Widowed

If your marital status changed during the year, provide date of change (dd/mm/yy): _____

3. Residence

Province, territory or Country (if not Canada) of residence on December 31: _____

Did you sell a residence (principal or other) during the year? Yes No

If yes, please provide the relevant details (address, date of purchase, date of sale, cost of purchase, and proceeds on sale.)

Do you designate the residence as your principal residence for all the years you have owned? Yes No

If no, please provide the years that you do not designate principal residence _____

Did you own a property that had a change in use Yes No
(Rental to principal residence/ Principal residence to rental) during the year?

If yes, please provide the relevant details (address, date of purchase, date of change in use, cost of purchase, and fair market value on the day of the change in use).

Did you purchase a home that qualifies for the First Time Home Buyers credit? Yes No

If yes, please provide the relevant details (date of purchase and address)

4. Elections Canada

Are you a Canadian citizen? Yes No

If yes, do you authorize the CRA to provide your name, address, and date of birth to Elections Canada to update your information on the National Register of Electors. Yes No

5. Foreign Reporting—T1135

Did you own or hold foreign property (including foreign cash, stock and rental property) with a total cost of more than CDN\$100,000 at any time during the year? Yes No

If yes, please provide list and relevant details. If you have foreign investments, please have your investment adviser provide a T1135 foreign asset and income report.

6. Dependents

Provide details of any new dependents:

Name	Relationship	Date of Birth	Social Insurance Number (SIN)	Physically or Mentally Infirm?

7. Direct Deposit Set Up

If you would like to set up your tax refund to be deposited directly into your bank account please provide a void cheque. Yes No

8. Payment of Accounting Fees

If you would like to pay your accounting fees with a credit card, you can either phone the office with your information or provide the information below:

Type of card (VISA, MasterCard or American Express) _____
Card number _____
Expiry Date (mm/yy) _____
Security code (at the back of your credit card) _____

Alternately you can pay by cheque or email transfer. Email your payment to info@mcleanbartok.ca and use the invoice number being paid as the answer to the security question.

9. Other Comments

10. Signed
