

**CANADIAN INDIVIDUAL INCOME TAX RETURN ORGANIZER**  
 FOR INTERNAL USE ONLY BY THE BRUNTON – MCCARTHY CPA FIRM CHARTERED  
**FOR CALENDAR YEAR \_\_\_\_\_ CURRENT DATE \_\_\_\_\_**  
 (Husband and Wife must each complete a separate organizer)

TO AVOID DELAY WITH YOUR RETURN PLEASE ANSWER ALL QUESTIONS AND PROVIDE COPIES OF APPLICABLE DOCUMENTATION

1. Name \_\_\_\_\_ Telephones: Home: \_\_\_\_\_ Office: \_\_\_\_\_
2. Address \_\_\_\_\_ Cell: \_\_\_\_\_ Fax: \_\_\_\_\_  
 \_\_\_\_\_ Email: \_\_\_\_\_
3. Social Insurance Number \_\_\_\_\_ Date of Birth \_\_\_\_\_
4. Martial Status:  Married  Living common-law  Widowed  Divorced  Separated  Single
5. Name of your spouse, if applicable \_\_\_\_\_ Spouse's Social Insurance Number \_\_\_\_\_  
 Spouses total income \_\_\_\_\_
6. Dependent Children: Name \_\_\_\_\_ Year Born \_\_\_\_\_ Did each live with you all year  Yes  No
7. Province, state, or territory of residence at year-end. \_\_\_\_\_
8. Number of day spent in Canada during the calendar year \_\_\_\_\_
9. Date you became, or ceased to be, a resident of Canada during the year (if applicable) (Entry) \_\_\_\_\_ (Departure) \_\_\_\_\_
10. Did you own or hold foreign (non-Canadian) property at any time in 2009 with a total cost of more than Cdn \$100,000?  
 If yes, please list each type of property \_\_\_\_\_ Cost \_\_\_\_\_
11. Attach receipt (as mailed to you by the Tax Department) for 2009 income tax paid by installments. Yes/No? \_\_\_\_\_ Comments: \_\_\_\_\_
12. Did you receive income from any of the following sources:
  - a) i) Salary or commission (attach T-T4-A slips) Yes/No? \_\_\_\_\_ Comments: \_\_\_\_\_
  - ii) Allowance for automobile or other expenses Yes/No? \_\_\_\_\_ Comments: \_\_\_\_\_
  - iii) Tips and gratuities Yes/No? \_\_\_\_\_ Comments: \_\_\_\_\_
  - b) Unemployment Insurance benefits (attach T4U slip) Yes/No? \_\_\_\_\_ Comments: \_\_\_\_\_
  - c) Old Age Security Pension (attach T4A OAS slip) Yes/No? \_\_\_\_\_ Comments: \_\_\_\_\_
  - d) Canada Pension Plan (attach T4A slip) Yes/No? \_\_\_\_\_ Comments: \_\_\_\_\_
  - e) Business, farming or partnership income Yes/No? \_\_\_\_\_ Comments: \_\_\_\_\_
  - f) Dividends (attach T5 slips) Yes/No? \_\_\_\_\_ Comments: \_\_\_\_\_
  - g) Bond interest (attach T5 slips) Yes/No? \_\_\_\_\_ Comments: \_\_\_\_\_
  - h) Bank interest (attach T5 slips) Yes/No? \_\_\_\_\_ Comments: \_\_\_\_\_
  - i) Mortgage or loan interest (attach T5 slips) Yes/No? \_\_\_\_\_ Comments: \_\_\_\_\_
  - j) Rental (give address of property along with a list of revenue and expenses on a separate sheet) Yes/No? \_\_\_\_\_ Comments: \_\_\_\_\_
  - k) Alimony, maintenance or separation allowance Yes/No? \_\_\_\_\_ Comments: \_\_\_\_\_
  - l) Bursaries and scholarships Yes/No? \_\_\_\_\_ Comments: \_\_\_\_\_
  - m) Other income (e.g. annuities, pensions, royalties, registered retirement savings plans, etc.) Attach T4A, T4RSP, T4A(P) slips. Yes/No? \_\_\_\_\_ Comments: \_\_\_\_\_
13. Did you dispose of any capital properties such as:
  - a) Personal use property Yes/No? \_\_\_\_\_ Comments: \_\_\_\_\_
  - b) Real Estate Yes/No? \_\_\_\_\_ Comments: \_\_\_\_\_

- c) Principal residence Yes/No? \_\_\_\_\_ Comments: \_\_\_\_\_
- d) Stocks, bonds, debentures and other investments Yes/No? \_\_\_\_\_ Comments: \_\_\_\_\_

If any of the above have been answered "Yes" it is necessary for you to determine the basis of valuation to be used. Please supply all details of sales or disposals.

- 14. Did you incur any expenses (interest, safety deposit box, carrying charges, etc.) in connection with income reported above. (If "Yes", please provide a detailed list and the amount) Yes/No? \_\_\_\_\_ Comments: \_\_\_\_\_  
 Were any assets purchased in connection with earning of income (automobiles, equipment). Please provide details. Yes/No? \_\_\_\_\_ Comments: \_\_\_\_\_
- 15. Did you contribute to a registered pension, retirement savings plan, education savings plans, tax-free savings account, accounts management trust for minors, or other U.S. tax deferred plans? If so, attach receipts, along with Canada Customs and Revenue Agency notification for the maximum allowable. Yes/No? \_\_\_\_\_ Comments: \_\_\_\_\_  
 Did you contribute to a US 401(k)? Yes/No? \_\_\_\_\_ Comments: \_\_\_\_\_
- 16. Did you make any charitable, religious or political donations? If so, attach receipts. Yes/No? \_\_\_\_\_ Comments: \_\_\_\_\_
- 17. Did you incur any medical expenses? (attach receipts) Yes/No? \_\_\_\_\_ Comments: \_\_\_\_\_
- 18. Did you pay any union, professional dues or tuition fees? Yes/No? \_\_\_\_\_ Comments: \_\_\_\_\_
- 19. Did you pay alimony or separation allowance? Yes/No? \_\_\_\_\_ Comments: \_\_\_\_\_
- 20. Did you incur any childcare expenses? Please provide the name, address, SIN number of recipient and the amount paid. Yes/No? \_\_\_\_\_ Comments: \_\_\_\_\_
- 21. Did you incur any employment expenses? Please provide description and amount. Yes/No? \_\_\_\_\_ Comments: \_\_\_\_\_
- 22. If you took a new job during the year and moved 40km (25 miles) or more closer to your new job, did you incur moving expenses? Yes/No? \_\_\_\_\_ Comments: \_\_\_\_\_
- 23. If you incurred any limited partnership losses and exploration and development expenses, provide details. \_\_\_\_\_
- 24. Provincial Property Tax Credit:
  - a) Rent paid in 2009 for leased living quarters \$ \_\_\_\_\_
  - b) Property tax paid in 2009 for principal residence \$ \_\_\_\_\_
  - c) Length of time at each address. \_\_\_\_\_
- 25. Disability deduction is applicable if you or your spouse were mentally or physically impaired at any time during the year or confined to a bed or wheelchair for a substantial period each day. \_\_\_\_\_
- 26. If we have not previously prepared your income tax returns, include a copy of your 2008 income tax return.
- 27. Please include a copy of the Canada Customs and Revenue Agency **NOTICE OF ASSESSMENT** for your previous year's income tax return.
- 28. Have you answered all questions & supplied all documents requested on this questionnaire? Yes/No? \_\_\_\_\_  
 If "No" please explain, otherwise your tax return may be delayed and/or the fee may be increased because of the extra time required.

Signed: \_\_\_\_\_

PLEASE RETURN TO: THE BRUNTON – MCCARTHY CPA FIRM CHARTERED, 4710 NW 2ND AVENUE, #101, BOCA RATON, FL 33431  
 Tel: (561) 241-9991 Fax: (561) 241-6332 Email: [tax@taxintl.com](mailto:tax@taxintl.com) Website: [www.taxintl.com](http://www.taxintl.com)

**Please include a US \$250 retainer with this organizer.**

If you wish, retainers can be paid on-line with a credit card. Please go to our website [www.taxintl.com](http://www.taxintl.com) and scroll down to PayPal on the lower right hand side.