



300 – 309 McDermot Avenue, Winnipeg, Manitoba R3A 1T3
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TAX ORGANIZER[©]
2018 TAXATION YEAR

NAME: _____

Please note that Canada Revenue Agency is imposing harsh penalties for unreported income due to missing slips on personal tax returns, even where no taxes are payable. Please ensure you have collected all slips or advise us if you expect additional slips.

If a slip is received after filing please advise us.

<u>QUESTIONS</u>	<u>Yes</u> √	<u>INFORMATION REQUIRED</u>	<u>Info.</u> <u>Incl.</u> √
Did you file an income tax return last year?	<input type="checkbox"/>	Copy of <u>all</u> Assessment and Re-Assessment Notices received from Canada Revenue Agency (CRA) in the year	<input type="checkbox"/>
Is this the first year we are preparing your tax return?	<input type="checkbox"/>	Copy of prior year's tax return	<input type="checkbox"/>
Did you pay income tax instalments?	<input type="checkbox"/>	CRA summary of instalments (on the back of your remittance statements for the year)	<input type="checkbox"/>
Were there changes in marital status or dependents?	<input type="checkbox"/>	Advise Lazer Grant	<input type="checkbox"/>
Were there any children born during the year? Do you intend to claim credit for dependents?	<input type="checkbox"/>	Name, date of birth, relationship, and Social Insurance No. (if available) and their income	<input type="checkbox"/>
Were you employed or in receipt of commission income?	<input type="checkbox"/>	T4, T4PS slips from each employer	<input type="checkbox"/>
Did you receive any employment insurance benefits?	<input type="checkbox"/>	T4E slips	<input type="checkbox"/>
Did you receive pension, annuity or other retirement income?	<input type="checkbox"/>	T4A, T4A(OAS), T4A(P), T4RSP, T4RIF, T4A(RCA), T10 slips	<input type="checkbox"/>
Did you receive interest, dividends or other investment income?	<input type="checkbox"/>	T5, T5008, T3, T5013/T5013A, T101 slips, investment broker statements	<input type="checkbox"/>
Did you pay professional or union dues?	<input type="checkbox"/>	Receipt for dues paid	<input type="checkbox"/>
Did you make contributions to an RRSP?	<input type="checkbox"/>	RRSP receipts	<input type="checkbox"/>
Did you incur childcare expenses, including payments to residential camps?	<input type="checkbox"/>	Amount paid and the name, address and social insurance number of the person paid, number of weeks at camp	<input type="checkbox"/>

Did you incur expenses related to registering your child under 16 in a prescribed program of physical activity? Are you 16-24 years old and were you registered in a prescribed program of physical activity?	<input type="checkbox"/>	Program receipts (Manitoba tax credit only)	<input type="checkbox"/>
Did you incur expenses related to registering your child in a prescribed program of artistic, cultural, recreational or developmental activity?	<input type="checkbox"/>	Program receipts (Manitoba tax credit only)	<input type="checkbox"/>
Did you pay expenses related to the adoption of a child?	<input type="checkbox"/>	Advise Lazer Grant	<input type="checkbox"/>
Did you spend at least \$100 on tuition? (note education and textbook portion of credit no longer available)	<input type="checkbox"/>	T2202 or T2202A or TL11A, B, C and D, or tuition/examination fee receipt, student loan interest	<input type="checkbox"/>
Did you use RRSP funds to finance full-time training or education?	<input type="checkbox"/>	Lifelong Learning Plan Withdrawal Application – Form RC96 and T4RSP	<input type="checkbox"/>
Do you intend to claim your dependent's education or tuition fee credit?	<input type="checkbox"/>	T2202 or T2202A or tuition fee receipt, signed by your dependent and details of dependent's income	<input type="checkbox"/>
Did you receive or pay alimony or maintenance allowance from/to your spouse or former spouse, pursuant a written agreement or order before April 30, 1997?	<input type="checkbox"/>	Details, including a copy of your divorce or separation agreement if this is the first year	<input type="checkbox"/>
Did you receive or pay spousal support from/to your spouse or former spouse pursuant to a written agreement or order after April 30, 1997?	<input type="checkbox"/>	Details, including a copy of your divorce or separation agreement if this is the first year	<input type="checkbox"/>
Did you sell, dispose of, or transfer any property (e.g. stocks, bonds, cryptocurrency or other investments; your home, cottage or other real estate; personal property)? MUST report sale of ALL residential property	<input type="checkbox"/>	Document showing the sale proceeds, the costs of acquiring the property, the V-day value of the property if owned on December 31, 1971 and the costs incurred in selling the property, gain/loss report from your broker	<input type="checkbox"/>
Did you borrow money for investment purposes?	<input type="checkbox"/>	Information from the lender indicating the interest expense incurred	<input type="checkbox"/>
Did you incur carrying charges (e.g. accounting fees, investment counsel fee)?	<input type="checkbox"/>	Details	<input type="checkbox"/>
Did you own any rental property?	<input type="checkbox"/>	Schedule showing rental income and expenses	<input type="checkbox"/>
Were you self-employed, including as a partner?	<input type="checkbox"/>	Income statement or a list of your receipts and expenses, partnership financial statements or T5013, details of vehicle purchases or leases	<input type="checkbox"/>
Do you earn any income through Internet websites or web pages?	<input type="checkbox"/>	Advise Lazer Grant	<input type="checkbox"/>
Did you incur employment expenses (e.g.. auto, travel, office in home, supplies, assistant, tools, transport employee's expenses) for which you were not reimbursed by your employer?	<input type="checkbox"/>	Form T2200 completed by your employer and the number of business and personal kilometers driven; details of the expenses <u>or</u> Transport Employees Form TL2	<input type="checkbox"/>

If you incurred employment expenses, is your employer registered for GST?	<input type="checkbox"/>	Employer's GST number	<input type="checkbox"/>
Are you a teacher or ECE? Do you intend to claim a credit for the eligible educator school supply tax credit?	<input type="checkbox"/>	Certification from your employer	<input type="checkbox"/>
Do you intend to claim a credit for medical expenses, including premiums to private health insurance plans?	<input type="checkbox"/>	Receipts for medical expenses incurred in the current year (e.g. Pharmacy summary of <u>total</u> prescription drug purchases, Blue Cross statements, receipts for payment of insurance premiums, etc)	<input type="checkbox"/>
Did you incur medical expenses related to fertility treatments (e.g.. in vitro fertilization, drug therapies, insemination procedures, etc)?	<input type="checkbox"/>	Medical receipts	<input type="checkbox"/>
Did you donate to registered charities during the year? If yes, please advise if this is the first year of donating.	<input type="checkbox"/>	Receipts for charitable donations	<input type="checkbox"/>
Did you donate publicly listed securities or ecologically sensitive land?	<input type="checkbox"/>	Details of donation	<input type="checkbox"/>
Did you contribute to a provincial or federal political party?	<input type="checkbox"/>	Contribution receipts	<input type="checkbox"/>
Did you purchase a tax shelter (other than an RRSP)?	<input type="checkbox"/>	Details and supporting documentation, T5003, T101, T5006, T5013, T2038	<input type="checkbox"/>
Do you intend to claim a disability credit for you or any of your dependents?	<input type="checkbox"/>	Advise Lazer Grant. Impairments can include vision, speaking, hearing, walking, mental functions, self-care and life-sustaining therapy	<input type="checkbox"/>
Did you provide care for a parent or grandparent 65 years of age or over, or an infirm dependent relative?	<input type="checkbox"/>	Advise Lazer Grant	<input type="checkbox"/>
Did you receive income not covered by the above questions (e.g. foreign source income, tips, gratuities, director's fees, training allowance, research grants, scholarships, fellowships, bursaries, stock option plans)?	<input type="checkbox"/>	Details and supporting documentation	<input type="checkbox"/>
Did you pay rent?	<input type="checkbox"/>	Details of amount paid, address, number of months resident and name of landlord(s)	<input type="checkbox"/>
Did you pay property taxes?	<input type="checkbox"/>	Copy of your property tax bill	<input type="checkbox"/>
Did you move your residence at least 40 kilometers closer to a new place of work or business?	<input type="checkbox"/>	Receipts or details of moving expenses	<input type="checkbox"/>
Did you use RRSP funds to buy a home?	<input type="checkbox"/>	Home Buyer's Plan RRSP Withdrawal Application - Form T1036(E)	<input type="checkbox"/>

Did you purchase a home during the year *and* you did not live in another home owned by you or your spouse in the year of acquisition or any of the four preceding years? Advise Lazer Grant

Did you apply for the small business venture capital tax credit? A copy of the small business venture capital tax credit receipt

Did you own or hold foreign property at any time in the year with a total cost of more than CAN \$100,000? Complete Foreign Income Verification form

Are you a beneficiary of a non-resident trust ? Advise Lazer Grant

Did you transfer or lend property to a non-resident trust in the year? Advise Lazer Grant

Are you a U.S. citizen? Advise Lazer Grant

Are you a volunteer fire fighter? Advise Lazer Grant

Are you a search and rescue volunteer? Advise Lazer Grant

Did you install a geothermal ground source heating system or solar thermal heating equipment during the year? Advise Lazer Grant

Did you make home renovations that made your home safe or more accessible for seniors or individuals with a disability tax credit? Advise Lazer Grant

Do you want CRA to provide your name, address, and date of birth to Elections Canada? Yes No

Do you want CRA to provide Elections Canada with your citizenship status? Yes No

If yes, are you a Canadian citizen? Yes No

Additional items/notes for discussion with Lazer Grant:
