

CANADIAN INDIVIDUAL INCOME TAX RETURN ORGANIZER

(FOR INTERNAL USE ONLY BY ABITOS ADVISORS, LLC)

FOR TAX RETURN YEAR ENDED _____ CURRENT DATE _____

(Each spouse complete a separate organizer)

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

PART I – GENERAL INFORMATION

1. Name _____ Date of Birth: _____ E-Mail: _____
- 1a. Phones: (U.S.): _____ (Non-U.S.): _____ Cell: _____ Office: _____
2. Address _____
- 3a. U.S. Taxpayer Identification Number, if any. (Please do not give a non-U.S. e.g. foreign number) _____
- 3b. Country(ies) of citizenship _____ Occupation _____
4. Marital Status: Single _____ Married _____ Living common-law _____ Widowed _____ Divorced _____ Separated _____
5. Name of your spouse, if applicable _____ Spouse's Social Insurance Number _____
Spouse's total income _____ Citizenship _____ Date of Birth _____
6. Please attach the following details regarding each dependent child: Name _____ Country of birth _____
Date of birth _____ Social Insurance Number _____ Income _____
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) _____

PART II – INTERNATIONAL REPORTING FORMS

10. Did you own or hold foreign (non-Canadian) property at any time in 2023 with a total cost of more than CDN \$100,000? Yes / No _____
(eg. Non-Canadian trusts, non-Canadian corporations, non-Canadian bank and brokerage accounts, non-Canadian real estate).
If "Yes", please complete the "T1135 organizer".
11. Did you have an interest in a foreign (non-Canadian) corporation or trust at any time during 2023? Yes / No _____
If "Yes", please contact us immediately.
12. Were you a contributor, connected contributor, or resident contributor of a foreign (non-Canadian) trust, arrangement, or entity at any time during 2023? Yes / No _____
If "Yes", please contact us immediately.
13. Were you a beneficiary of a foreign (non-Canadian) trust, and received a distribution from or were indebted to the foreign (non-Canadian) trust at any time during 2023? Yes / No _____
If "Yes", please contact us immediately.

PART III – CURRENT YEAR TAX INFORMATION

14. Attach receipt (as mailed to you by the Tax Department) for 2023 income tax paid by installments.
15. 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: _____ |

Please complete reverse side also



- 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: _____

16. 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 has been answered "Yes" please contact us immediately; it is necessary for you to determine the basis of valuation to be used. Please supply all details of sales or disposals.

17. 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: _____

18. Were any assets purchased in connection with earning of income (automobiles, equipment). Please provide details.

Yes / No _____ Comments: _____

19. Do you have, and/or did you contribute to a Canadian registered pension plans, Registered Retirement Savings Plans, education Savings Plans, Tax-Free Savings Account, Accounts Management Trust for minors, or other Canadian tax deferred plans? If so, attach receipts, along with Canada Customs and Revenue Agency notification for the maximum allowable.

Yes / No _____ Comments: _____

20. Do you have, and/or did you contribute to any U.S. or other non-Canadian pension or tax deferred plans, including a 401(k), IRA or Roth IRA?

Yes / No _____ Comments: _____

21. Do you have, and/or did you receive a distribution from a Canadian registered pension plans, Registered Retirement Savings Plans, education Savings Plans, Tax-Free Savings Account, Accounts Management Trust for minors, or other Canadian tax deferred plans? If so, attach receipts and documents.

Yes / No _____ Comments: _____

22. Do you have, and/or did you receive a distribution from any U.S. or other non-Canadian pension or tax deferred plans, including a 401(k), IRA or Roth IRA?

Yes / No _____ Comments: _____

23. Did you make any charitable, religious or political donations? If so, attach receipts.

Yes / No _____ Comments: _____

24. Did you incur any medical expenses? (attach receipts)

Yes / No _____ Comments: _____



25. Did you pay any union, professional dues or tuition fees? Yes / No _____ Comments: _____
26. Did you pay alimony or separation allowance? Yes / No _____ Comments: _____
27. Did you incur any childcare expenses? Please provide the name, address, SIN number of recipient and the amount paid. Yes / No _____ Comments: _____
28. Did you incur any employment expenses? Please provide description and amount. Yes / No _____ Comments: _____
29. 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: _____
30. If you incurred any limited partnership losses and exploration and development expenses, provide details. _____
31. Provincial Property Tax Credit: a) Rent paid in 2023 for leased living quarters \$ _____
b) Property tax paid in 2023 for principal residence \$ _____
c) Length of time at each address. _____
32. 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. _____
33. If we have not previously prepared your income tax returns, include a copy of your 2022 income tax return.
34. Please include a copy of the Canada Revenue Agency **NOTICE OF ASSESSMENT** for the 2022 income tax return.

If you have not answered all questions & supplied all documents requested on this organizer, please explain, otherwise your tax return may be delayed and/or the fee may be increased due to the extra time required.

Signed: _____

PLEASE RETURN TO:

ABITOS ADVISORS, LLC
327 PLAZA REAL, STE 235, BOCA RATON, FL 33432

Tel: (561) 241-9991

Fax: (561) 826-9299

E-Mail: bsk@abitos.com

Website: www.abitos.com

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