

# CANADIAN INDIVIDUAL INCOME TAX RETURN ORGANIZER

(FOR INTERNAL USE ONLY BY ABITOS, CPAs AND ADVISORS,  
FORMERLY KNOWN AS THE BRUNTON STRACHAN & KHAN CPA FIRM)

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. Social Insurance Number \_\_\_\_\_ Occupation \_\_\_\_\_
- 3b. Country(ies) of citizenship \_\_\_\_\_
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 2022 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 2022? 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 2022? 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 2022? 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 2022 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 2022 for leased living quarters                      \$ \_\_\_\_\_  
     b) Property tax paid in 2022 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. Did you receive a Canada Emergency Response Benefit (CERB) or other COVID related relief?                      Yes / No \_\_\_\_\_  
     Comments: \_\_\_\_\_
- 34. If we have not previously prepared your income tax returns, include a copy of your 2021 income tax return.
- 35. Please include a copy of the Canada Revenue Agency **NOTICE OF ASSESSMENT** for the 2021 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, CPAs AND ADVISORS**  
**327 PLAZA REAL, STE 235, BOCA RATON, FL 33432**

Tel: (561) 241-9991      Fax: (561) 826-9299      E-Mail: [bsk@abitos.com](mailto:bsk@abitos.com)      Website: [www.abitos.com](http://www.abitos.com)