



**VISTA ACCOUNTING  
PROFESSIONAL CORPORATION**

Chartered Professional Accountant  
#216, 1935 – 32 Avenue NE  
Calgary, Alberta, T2E 7C8  
P. (403) 719-7985 F. (403) 719-7983  
[www.vistacpa.ca](http://www.vistacpa.ca)

**PERSONAL TAX ORGANIZER**

FAMILY NAME \_\_\_\_\_

First name \_\_\_\_\_

Social Insurance Number \_\_\_\_\_

Date of birth \_\_\_\_\_

**A tax return should be filed for anyone who turned 18 in the year or has earned income.**

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Address: \_\_\_\_\_

*Please review the following items, check all appropriate boxes, and provide backup documents in the envelope.*

**INCOME**

- T3 Trust income, mutual funds
- T4 Employment income
- T4A Other/pension income
- T4A(OAS) Old Age Security
- T4A(P) Canada Pension Plan
- T4RSP RRSP Income
- T4RIF RIF Income
- T4E Employment Insurance
- T5 Interest/Dividends
- T5013 Partnership Income
- T5007 WCB Benefits/Social Assistance
- T5018 Subcontractor
- Rental Income and Expenses
- Farming Income and Expenses
- Self-employed Income and Expenses
- Capital Gains/Losses
- Spousal Support/Maintenance Received
- Sale Details of Stocks/Bonds/Real Estate, etc.
- Other \_\_\_\_\_

**CREDITS/DEDUCTIONS**

- Employment Expenses (T2200)
- Union or Professional Dues
- Family Medical Expenses
- Tuition Slips (T2202A)
- Donations
- RRSP Contributions
- First Time Home Buyer
- Spousal Support/Maintenance Paid
- Political Donations
- Child Care Expenses
- Interest Paid to Earn Income
- Interest Paid on Student Loans
- Moving Expenses (receipts are required)
- Vehicle Mechanic Apprentice Tools and Expenses
- Instalments Paid
- Investment Counsel Fees Paid
- Automobile Expenses
- Home Office Expenses
- Home Accessibility
- Educator - School Supplies
- Other \_\_\_\_\_

Please answer the following questions YES (Y) or NO (N). If yes, please provide details.

\_\_\_\_\_ Are you or a family member a US citizen? Is either of your parents a US citizen?

\_\_\_\_\_ Do you have assets outside of Canada with an original cost of \$100,000 or more? (Does not include RRSP or personal use property. Does include US\$ denominated securities.

\_\_\_\_\_ Did you live in a prescribed northern zone AT ANY TIME in the year? (Generally, anywhere in Northern Alberta)

\_\_\_\_\_ Has your direct deposit information changed, or do you want to start direct deposit? If so, please include a VOID Cheque or direct deposit form.

\_\_\_\_\_ Has your marital status changed during the year? Any changed of dependents during the year (birth/adoption of a child)? Please provide details – what changed? Also, provide name and date of birth of child.

\_\_\_\_\_ Do you or a family member have a disability tax credit certificate? Ask us for details as you or a dependent may qualify.

\_\_\_\_\_ Do you have an RRSP Home Buyer's or Lifelong Learning Plan? If so, please provide details of repayment.

\_\_\_\_\_ Do you provide in-home care for a parent or grandparent (including in-laws) 65 yrs. or older or an infirm dependent relative? If the dependent has a very low income, you may be eligible for a tax credit.

\_\_\_\_\_ Did you sell your principal residence during the year? If yes, please provide the year purchased, date sold, and the selling price.

**Our billing policy requires full payment for services rendered before tax returns are filed.**

Comments: \_\_\_\_\_  
\_\_\_\_\_