



PERSONAL TAX ORGANIZER 2018 TAX YEAR

Name: _____ Spouse/Common-law partner: _____

Address: _____

Marital status: _____ Email: _____

Home Ph: _____ Work Ph: _____ Cell Ph: _____

Dependant's Name(s): Relationship: Date of Birth: Disability, if any Net Income (please provide)

REMINDER: Provide your Notice of Assessment for 2017 and any Notice of Reassessments received during 2018 for any prior year.

Are you a Canadian citizen?	Yes	No
Are you an Aboriginal person?	Yes	No
Do you authorize the CRA to give your name, address, date of birth and citizenship to Elections Canada for the National Register of Electors?	Yes	No
Are you a U.S. citizen or green card holder?	Yes	No
Have you spent more than 30 days in the U.S. in any of the last three years?	Yes	No
If yes, please provide the number of days spent in the U.S. in each of: 2016 _____ 2017 _____ 2018 _____		

INCOME – DID YOU RECEIVE:	YES	NO	IF YES – SEND US:
Employment or commission income Directors Fees or Executors Fees			T4 or T4PS slips and details of other benefits or employment income not on T4 slips (e.g. tips)
Payments from an estate or trust			T3 slips or related information
Canada Pension Plan and Old Age Security benefits			T4A(P) slip, T4A(OAS) slip
Employment Insurance Benefits			T4E slip
Pension income **Split pension income with spouse Yes No			T4RSP / T4RIF / T4A slips
Canadian dividends or interest			T3 / T5 slips
Income from sources outside of Canada			Slips or details if no slips - see Foreign Reporting Checklist
Investment in tax shelters / limited partnerships/ REIT's			Details of investment, and T5013 / T3 slips
Income or gains from Bitcoin or other Cryptocurrency Transactions			Provide details related to transactions
Interest, dividends, benefits, or gains from a business (<i>split income</i>) where a relative is a key party			Slips or details where no slips available
Rental / business/ professional / farming / fishing income **Did you hire an eligible apprentice In your business? Yes No **Are you registered for GST/HST Yes No			<ol style="list-style-type: none"> 1. Details of income and expenses (P&L) 2. Provide the following: (1) the number of internet webpages/websites your business earns income from; (2) a list of the webpages/site addresses; and (3) the percentage of gross income generated from the webpages/websites
Proceeds from the sale of any stocks, bonds, real estate, timber or options or redemption of any mutual fund units			Description of assets, year of acquisition, date and proceeds of disposition, adjusted cost base and selling costs, and your annual trading summary
Any income not listed above (e.g. social assistance, Workers' Compensation, Alimony, etc.)			Slips or details where no slips available
Proceeds from the sale of your principal residence or other real property or change in use (ie: converting a portion of your principal residence into an income earning property, such as a rental suite)			<ol style="list-style-type: none"> 1. Details - sales proceeds, description of property, year property was acquired, the cost of the property. 2. Details for any past change-in-use of the property

DEDUCTIONS / CREDITS – FOR THIS TAX YEAR, DID YOU:	YES	NO	IF YES – SEND US:
Contribute to or roll-over eligible income to an RRSP			Tax receipts
Pay interest on your student loan in the current year, or in prior years and have not claimed it			Interest statements
Pay union or professional dues			Tax receipts
Make charitable or political donations			Tax receipts
Live in a prescribed area which qualifies for the Northern Residents Deduction			Provide dates and residence details
Renovate or alter your home to enhance mobility or reduce the risk of harm for individual that qualifies for DTC or is aged 65+ as at 12/31/18			Certain expenditures up to \$10,000 may qualify - provide agreements, invoices and receipts - must include full details of contractor, work done, costs, delivery date, etc.
Incur moving expenses to move at least 40 km's closer to work or school			Details and receipts
Pay or receive alimony or maintenance support pursuant to a court order or written agreement. Please provide a copy of the agreement. Date of Agreement (or date of substantial amendment): _____			To / from whom: _____ SIN: _____ Address: _____ Amount: \$ _____
Pay child care expenses so you could work or attend school (including summer camp)			To whom: _____ SIN or BN: _____ Address: _____ Amount: \$ _____ If boarding school or camp, # of weeks: _____
Incur expenses to earn investment income (e.g. investment counsel or "wrap" fees, interest)			Details and receipts
Pay any foreign taxes			Provide copies of any foreign tax returns filed and any associated tax assessments.
Did you or your spouse or dependent child(ren) become disabled during the year?			Form T2201 to be completed by your physician.
Pay for medical or dental expenses for you and any dependent persons for which you were not reimbursed or for premiums for extended medical or dental coverage, including out of country medical coverage			List of expenses and the receipts (any 365 day period ending in the current year is eligible)
Invest in any tax shelters or receive any reporting regarding any prior years			Details, T5003, etc.
Incur any board / lodging costs as a transport employee			Form TL2 to be completed by your employer
Incur any expenses to maintain an office in your home as required by your employer			Form T2200 to be completed by your employer Details of GST paid by you for the expenses
Incur any automotive or business expenses as an employee			Form T2200 to be completed by your employer Auto log
Buy any tradesperson's or apprentice mechanic's tools			Receipts
Did you or your spouse or any of your dependent children attend university or college			Form T2202A/T2202/TL11B/TL11C slip signed by the student
Did you support any relatives who were disabled, or did you reside with and provide in-home care for a parent or grandparent who is over 65, or for an infirm dependent adult relative			Details, including the income of the person receiving the care
Incur any exploration and development expenses			T101/102 slips
Adopt a child under 18 years old during the year			Details of adoption fees, other expenses
Disability support expenses (speech, sight, hearing, attendant)			Provide receipts and details
Purchase your "first home" or one for a disabled person			Details
Volunteer as a firefighter or as a search and rescue volunteer for at least 200 hours in the year			Details
Did you purchase eligible school supplies as a teacher or early childhood educator			Form T2200 from your employer attesting to the eligible supplies expense and all receipts
Incur costs not previously allowed as a medical expense for medical intervention to conceive a child?			Amounts may be claimed for the previous 10 years. Provide receipts.

OTHER – DID YOU:	YES	NO	IF YES – SEND US:
Pay any federal tax instalments for the taxation year other than amounts deducted at source			Amount: \$ _____ Provide receipts and latest statement of account
Withdraw funds from your RRSP during the year, or in a prior year, for the Home Buyers' Plan or Lifelong Learning Plan			Details
Have a spouse or dependant with income and Blue Ink Accounting is not preparing their return			Details of spouse / dependant's income



2018 Foreign Reporting Checklist

Canadian tax law contains reporting requirements for Canadian residents who have foreign investments, own shares in foreign affiliates, have interests in foreign trusts, made loans or transferred property to a non-resident trust or have received a distribution or loan from a non-resident trust.

To help us determine whether you are required to file any of the forms relating to these reporting requirements, we ask that you answer the following questions and **return this checklist to us with your tax return information.**

It is very important that you carefully consider these questions when answering them. There are substantial penalties that will apply if the forms are not filed on time or filed incomplete. If you answer NO to the first four questions, this indicates to us that you will not have to complete any of the forms and will require no additional reporting. If you answer YES to any of these four questions, you may have to complete one or more of the forms and we may be contacting you for further information.

QUESTIONS:

1. Did you own or hold foreign property (i.e. assets located outside of Canada) at any time in 2018 with a total cost of more than CAN\$100,000?

*Foreign property includes assets such as bank accounts, shares of Canadian companies held through a foreign broker, shares in non-resident companies (even if held in a Canadian brokerage account), foreign real estate (except for vacation property owned strictly for personal use) and loans to a person not resident in Canada. **Do not consider assets held in your RRSP when answering this question.***

YES NO

2. Do you, together with related persons (including individuals, corporations or trusts), own 10% or more of the shares of a company that is not resident in Canada (i.e. a foreign affiliate)?

Note that this would include any shares you hold indirectly, such as through a Canadian corporation. In addition, certain non-resident trusts in which you, together with related persons, have a 10% or more interest are deemed to be nonresident corporations (and therefore will also be foreign affiliates).

YES NO

3. Have you ever transferred property or made a loan to a trust that is not resident in Canada?

A trust will be considered not to be not resident in Canada if the majority of the trustees live abroad. When answering this question, consider loans and transfers made at any time, even in prior years.

YES NO

4. Have you received a distribution or loan from a trust that is not resident in Canada in 2018?

For example, did you receive a distribution from an offshore trust set up by a non-resident family member?

YES NO

5. I have reviewed the summary of the reporting requirements for Form T1135 for the 2018 tax year, and

I would like Blue Ink Accounting to prepare Form T1135 and am advising that, to my knowledge, I have provided complete and correct information for all the specified foreign property that I own.

I do not require Blue Ink Accounting to prepare Form T1135 on my behalf.

After answering the above questions, please sign and date this checklist and return it to us with your 2018 tax information.

Name in print

Signature

Date