

**SHIMMERMAN PENN LLP**  
**2011 T1 PERSONAL TAX ORGANIZER**

*The T1 organizer is intended to provide you with guidance as to the information our firm requires in the preparation of your personal income tax return and possible foreign reporting. The lists provided below are not exhaustive, and if you are uncertain about any particular item please include it with a note so that we may advise you. In order to accurately prepare your income tax return, we request that all sections of this organizer be fully completed and returned to our office, and that a separate organizer be completed for each member of your family for whom you would like a 2011 income tax return prepared.*

**Tax Payments** – We strongly encourage the use of online and telephone banking to pay your tax instalments and final tax payment. If not already set up to do so, please contact your financial institution.

**Electronic Filing of Tax Returns** – Unless specified or required otherwise, all tax returns prepared by us will be filed electronically with the Canada Revenue Agency (“CRA”). When your return is completed, a copy of your tax return will be sent to you by e-mail (password protected) or fax in the case of no e-mail. You must approve and authorize your return for e-filing which will require you to sign Form T183 and return the signed form to our office by e-mail or fax. As part of the firm’s green initiative, we do not provide clients with paper copies of their tax returns unless specifically requested.

**GENERAL TAXPAYER INFORMATION:**

- **NAME:** \_\_\_\_\_
- **E-MAIL ADDRESS:** \_\_\_\_\_
- **E-MAIL PASSWORD:** \_\_\_\_\_
- **Indicate any changes to mailing address information or family status:**  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**INSTALMENT INFORMATION**

- Details of instalment payments made during 2011:
  - Federal (Canada Revenue Agency): \$ \_\_\_\_\_
  - Quebec (Ministere du Revenue): \$ \_\_\_\_\_

**ADDITIONAL TAXPAYER INFORMATION:**

Please check if applicable:

- You are a U.S. citizen**
- You hold a U.S. greencard
- You are a citizen of another country that requires you to file a tax return or other tax filings
- You worked outside of Canada during 2011
- You owned at some time in or during 2011 foreign investments/assets costing in aggregate more than (CAD)\$100,000
- At some time in or during 2011, you had funds and/or property transferred to or received from a foreign trust or a foreign corporation
- At some time or during 2011 you alone or together with related persons owned 10% or more of the share equity of a foreign corporation.
- During 2011, you acquired a residential home for the first-time.

*(Note: Shimmerman Penn LLP does not provide foreign income tax services. Upon client requests, the firm can provide referrals to other firms for the preparation of foreign tax filings or other services.)*

**INFORMATION REGARDING YOUR INCOME:**

- During 2011, did you receive any of the following items? (Check all that apply and attach the required tax receipts):

- Trust Income (T3)
- Employment Income/Remuneration (T4/T4A)
- Pension Income (T4A)
- Canada Pension Plan (CPP) Income (T4A(P))
- Old Age Security Income (T4(OAS))
- Unemployment Insurance (T4U)
- RRSP or RIF withdrawals (T4RSP / T4RIF)
- Dividend and/or Interest Income (T5)
- Partnership Income (T5013)
- Universal Child Care Benefits (RC62)
- Spousal Support Income (indicate amount received \$\_\_\_\_\_)

- Where the following income items were received during 2011, please provide the additional information as requested:

- Other Interest or Foreign Income not reported on T3 or T5 slips (*attach schedule with details*)
- Capital Gains or Losses (*attach broker statements or additional schedule with details of securities disposed, original cost, selling costs, and selling price*)
- Rental Income (*download and complete "Rental Income Statement" from SPLLP website*)
- Self Employment Income (*if not providing financial statements, download and complete "Self Employment Income Statement" from SPLLP website*)
- Professional Business Income (*if not providing financial statements, download and complete "Professional Business Income Statement" from SPLLP website*)

**INFORMATION REGARDING YOUR EXPENSES AND TAX CREDITS**

- During 2011, did you make any of the following disbursements? (Check all that apply and attach the receipts and/or provide additional information as required):

- Donations
- Political Contributions
- Medical Expenses
- Rent or Property Taxes
- Post-secondary Tuition Fees (T2202)
- Labour-sponsored Funds (T5006)
- Transit Passes
- Adoption Expenses
- Safety Deposit Box
- Union/Professional Dues
- RRSP Contributions (did you participate in the Home Buyer's Plan (Y/N)? \_\_\_\_\_)
- Spousal Support Paid - indicate amount paid, name and SIN of recipient:  
\$ \_\_\_\_\_, paid to: \_\_\_\_\_ SIN: \_\_\_\_\_
- Child Care Expenses (attach receipts for amounts paid including any T4s prepared for nannies)
- Child Fitness Expenses
- Child Artistic Activities Expenses – NEW FOR 2011**
- Interest Expenses on Investment Loans
- Investment Management Fees
- Employment Expenses (*download and complete "Schedule of Employment Expenses" from SPLLP website*) - NOTE: in order to deduct employment related expenses you must have a completed form T2200 signed by your employer

**OTHER COMMENTS / NOTES**

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