

SHIMMERMAN PENN LLP
2009 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 2009 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.

NEW FOR 2009

Home Renovation Tax Credit – Improvements to your house, condo or cottage made after January 27, 2009, and before February 1, 2010, are eligible for a non-refundable tax credit of 15% spent on eligible expenditures in excess of \$1,000 but not exceeding \$10,000 (for a list of eligible and ineligible expenses see “Schedule of Home Renovation Expenses” on the SPLLP website). If claiming this credit, please complete the “Schedule of Home Renovation Expenses” and e-mail us scanned copies of your receipts (or provide photocopies where scanning is not available).

First Time Home Buyers Tax Credit – Homes acquired by first time home buyers after January 27, 2009, may qualify their owners for a non-refundable tax credit of \$750.

GENERAL TAXPAYER INFORMATION:

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

ADDITIONAL TAXPAYER INFORMATION:

- Are you a U.S. citizen (Y/N)? _____
- Are you a U.S. green card holder (Y/N)? _____
- Are you a citizen of another country that requires you to file an income tax return or other tax information? If yes, provide details: _____

- Did you work outside Canada during 2009? If yes, provide details: _____

- At any time in the year, did you own foreign investments/assets costing in aggregate \$100,000 or more (Y/N)? _____
- At any time in the year, did you transfer to or receive from a foreign trust or a foreign corporation, any property or funds (Y/N)? _____
- At any time in the year, did you, either alone or together with one or more related persons, own 10% or more of the equity of a foreign corporation (Y/N)? _____

INFORMATION REGARDING YOUR INCOME:

- During 2009, 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 2009, 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 2009, 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
- _____ 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
- _____ Interest Expenses on Investment Loans
- _____ Investment Management Fees
- _____ Home Renovation Expenses (*download and complete "Schedule of Home Renovation Expenses" from SPLLP website and e-mail copies of scanned receipts to your regular contact at SPLLP*)
- _____ 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

ADDITIONAL INFORMATION

- Details of instalment payments made during 2009:
 - Federal (Canada Revenue Agency): \$ _____
 - Quebec (Ministere du Revenu): \$ _____
 - U.S. (I.R.S.): \$ _____

OTHER COMMENTS / NOTES
