



230–9600 Cameron Street  
Burnaby, BC V3J 7N3

Tel: 604.444.0344  
Fax: 604.444.0366

Email: [accting@arpartners.ca](mailto:accting@arpartners.ca)  
Web: [www.arpartners.ca](http://www.arpartners.ca)

## 2018 PERSONAL TAX ORGANIZER

### 1. Personal Information

	Name	SIN	Date of Birth (dd/mm/yyyy)	Phone	
Taxpayer				Office	
Spouse				Home	
Address				Cell	
Email					

Marital Status:             Married     Single     Common-law     Separated     Divorced     Widowed

Date of change if applicable: \_\_\_\_\_

### 2. Dependants

Name	SIN	Date of Birth (dd/mm/yyyy)	Relationship	Net Income

### 3. General Information

- |  |                                   |                              |
|--|-----------------------------------|------------------------------|
| 2018 Income tax instalments paid (Form T7D)              | <input type="checkbox"/> Included | <input type="checkbox"/> N/A |
| 2017 Notice of Assessment, unless retained by our office | <input type="checkbox"/> Included |                              |
| 2017 Income tax return if not prepared by our office     | <input type="checkbox"/> Included |                              |

#### 4. Income

- Salary, Wage or commission (T4)  Yes  No
- EI benefits (T4E)  Yes  No
- Dividends (T5/T3)  Yes  No
- Interest (T5/T600/T3)  Yes  No
- Other investment income  Yes  No
- Receipt of alimony/separation payments (name, address), agreement  Yes  No
- Worker's compensation, social assistance, supplements (T5007)  Yes  No
- Old Age Security (T4A OAS)  Yes  No
- Canada Pension (T4AP)  Yes  No
- Other pensions (T4A)  Yes  No
- RRSP income (T4RSP)  Yes  No
- RRIF income (T4RIF)  Yes  No
- Foreign pensions (USA, other)  Yes  No
- Statement of Partnership Income (T5013/T5013A)  Yes  No

***Please provide slips or receipts for all items marked as Yes***

#### 5. Self-employed

- Attach financial statements or complete the attached self-employed business activity checklist  Yes  N/A
- If, in 2018, you were at least 65 years old but under 70, you received CPP/QPP retirement benefit, you did not earn employment income, do you elect not to pay CPP contributions on self-employed earnings?  Yes  No

#### 6. Rental Property

- Attach rental statement or complete the attached rental activity checklist for each rental property  Yes  N/A

#### 7. Allowable Deductions/Credits

- Accounting fees  Yes  No
- Adoption related expenses  Yes  No
- Attendant care expenses  Yes  No
- BC Home Renovation Tax Credit for Seniors and Persons with Disabilities (refundable)  Yes  No
- Federal home accessibility tax credit  Yes  No
- Charitable donation (including donation by way of gifting an item in kind)  Yes  No
- Child care expenses (include name, address and SIN of person providing the child care)  Yes  No
- Commission/employment expenses (Please complete the attached commission/employment expenses checklist)  Yes  No
- Canada caregiver credit  Yes  No
- First-time home buyers' amount  Yes  No
- Home buyer's amount for home bought for a related person with a disability  Yes  No
- Interest expense on investment loans  Yes  No

- Interest paid on qualified student loans  Yes  No
- Investment counsel fees  Yes  No
- Medical expenses  Yes  No
- Moving expenses  Yes  No
- Payment of alimony/separation payments (name, address and SIN # of recipient)  Yes  No
- Political donation (BC and Federal)  Yes  No
- Professional membership fees if not reimbursed by your employers  Yes  No
- RRSP contribution (please include details regarding Home Buyers' Plan withdrawals and repayments and Lifelong Learning Plan repayment)  Yes  No
- T101 Statement of Resource Expenses  Yes  No
- Tuition over \$100 for yourself or your child (ensure Form T2202/T2202A is signed by your child on both sides & provide child's line 236 net income for tuition transfer to you)  Yes  No
- Union dues  Yes  No
- Volunteer fire-fighters' credit  Yes  No

***Please provide receipts for all items marked as Yes***

## 8. Disposals Resulting in Capital Gains or Losses

Applies to disposals of shares, real estate, bonds, etc.  Yes  No

If yes, provide the following:

- Description of asset
- Selling price, sale date & selling cost
- Purchase cost & purchase date
- Details of any previous capital gain exemptions claimed and capital gains elections (February 22, 1994)
- Capital gains reserves (form T2017)
- V-Day Value (Dec. 1971), if applicable

***Please provide documentation for the above***

## 9. Principal Residence (Actual or Deemed Disposal)

Reporting requirement for 2016 and beyond – must be reported.

Actual disposals or deemed disposals (e.g. change in use from or to rental)  Yes  No

If yes, provide the following:

- Address
- Year of acquisition
- Proceeds of disposition (actual disposal)
- Value at time it was changed to rental or at date of death (deemed disposal)

***Please provide documentation for the above***

## 10. Personal Exemptions

Provide details of spouse's line 236 net income (if applicable) unless we prepare the tax return.  Yes  No

## 11. Other

- + Do you wish to start direct deposit or to change account information for your tax refund?  Yes  No  
If “yes”, attach a “void” personalized cheque or your branch, institution and account number.
- + Do you have any foreign property, including cash, stocks, real estate, tangible or intangible property, with a combined original cost in excess of \$100,000 Canadian at any time in the year? Please note: shares of a non-resident corporation on deposit with a Canadian broker or shares of a Canadian corporation on deposit with a foreign broker count.  Yes  No  
If yes, please provide details of the foreign property you hold. If the foreign property is held by a broker or financial institution they may provide a specific report with the required information. If they do not provide this report, please provide your investment account statements for the year.  Yes  No
- + Do you authorize Canada Revenue Agency to provide your name, address and date of birth to Elections Canada to update your information on the National Register of Voters?  Yes  No

## 12. What's New for 2018?

The 2018 **top tax rates** for BC residents are 49.8% on **regular income**, e.g. wages, interest, and rental income, 43.73% on **non-eligible dividends**, 34.2% on eligible dividends and 24.9% on capital gains. These rates apply to income over \$205,842.

**Children's fitness tax credit and arts tax credit** has been eliminated for 2017 and beyond for federal tax and for 2018 and beyond for BC tax.

**Public transit tax credit** has been eliminated for public transit use that occurs after June 2017.

**First-Time Donor's Super Credit** has been eliminated for 2018 and beyond.

2018 will be the last year to claim the **BC education and textbook tax credits** as it will be eliminated for 2019 and beyond (unused credits can still be claimed in 2019 and later years).

## 13. What's New for 2019?

The 2019 **top tax rates** for BC residents are 49.8% on **regular income**, e.g. wages, interest, and rental income, 44.64% on **non-eligible dividends**, 31.44% on eligible dividends and 24.9% on capital gains. These rates apply to income over \$210,371.