

2021 PERSONAL TAX ORGANIZER

This organizer contains the most frequently changed information about your personal and tax account details. Answering each question assists both you and us in maintaining the accuracy and completeness of the information necessary to prepare your personal tax return and keeps our fees to a minimum. You may complete it once for your whole family, or provide copies for each family member, as desired. **For each question: Check = YES Blank = NO**

We will be providing your tax return copy to you electronically. Let us know if you would like a paper copy: _____

Personal Information / Contact Details

	Self	Spouse/Common-law Partner
First & Last Name		
SIN Number		
Date of Birth		
Home Phone		
Cell Phone		
Work Phone		
Email Address		
Mailing Address		

Non-Canadian mailing addresses are now available for Efile →

Please indicate province of residency at Dec 31, 2021: _____

If we are NOT preparing your partner's return, please provide →

Spouse Net Income (line 23600)

	Self	Spouse	Dependant	Information Required
Marital Status at December 31, 2021	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Marital status: _____ Date of Change (MM/DD/YYYY)
New family members or change to dependants in 2021	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	List names, dates-of -birth and SIN numbers OR Use Dependants Fill-in Form for completeness
Did you work in multiple provinces?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Provide details
Did immigrate or emigrate in 2021?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Provide details
Are you a Canadian citizen?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Check box to indicate "Yes"
Do you authorize CRA to provide your information to Elections Canada for the National Register of Electors?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Check box to indicate "Yes" Only Canadian citizens are eligible.
Are you a U.S. citizen?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Check box to indicate "Yes" You will be required to file U.S. tax returns. Let us know if you need assistance with this.
Are you a citizen of any other country?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Check box to indicate "Yes" Please indicate country:

NEW FOR 2022

CLIMATE ACTION INCENTIVE PAYMENT (CAIP)

For the last two years, Ontario residents (and some other provinces) have received a refundable credit for the Climate Action Incentive (CAI) as part of their tax return. This amount was used to increase their refund or decrease their taxes payable.

This year, the CAIP will be paid separately from your annual tax filing and paid directly to each family or individual over 18 on a quarterly basis starting in July 2022. The application is part of your annual tax return. The credit is not limited by income. If you receive an unexpected payment in July 2022 and quarterly afterward, this may be the CAIP. Registering for Direct Deposit through your CRA My Account is recommended.

Do you need help with gathering your documents? See our [Personal Tax Checklist](#)

For secure document delivery:
[Register for a Portal Login](#)
[Login to your Portal](#)

KOROLL & COMPANY
 CHARTERED PROFESSIONAL ACCOUNTANTS
 PROFESSIONAL CORPORATION

38 Prospect Street, Newmarket ON L3Y 3S9
 Phone 905.898.4231
 Toronto 416.969.8118
 Fax 905.898.3760
 Email info@koroll.ca



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Canada Revenue Agency (CRA) Tax Account – Required Information

	Self	Spouse	Dependant	
Direct Deposit – of refunds or credits: This remains in place at CRA unless changed or revoked/per your instructions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Attach void cheque if you want to register or change a previous direct deposit designation. Other options available through CRA or your bank .
Have you registered for CRA’s “My Account” online service?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Check box to indicate “Yes” This means you have created a secure log-in to your tax or COVID supplements account on the CRA website.
CRA My Account Security: You are now required to register an email address and multi-factor authentication				Log-in to your CRA My Account to update the required security. You can use a different email from the one you provided to us on page one.
Mailed notices from CRA are being eliminated by 2023: Have you already or previously registered for CRA’s online mail service?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	We recommend registering for CRA’s online mail service by logging-in to your CRA My Account. This means you currently receive CRA account notifications by email. Paper mail will NOT be sent.
Do you want us to <u>register</u> your email for CRA’s online mail service?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Please provide email address for CRA online mail:
OR Do you need us to <u>update</u> your email address for CRA’s online mail service?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Please provide updated/replacement email address:

Forms for Signature

	Self	Spouse	Dependant	Documents Required
Form T183 Information Return for Electronic Filing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	MANDATORY authorization for Efile - Sign Part “F” only T183 Information Return - 2021
Foreign Property Reporting –over \$100,000 in property or investments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	MANDATORY form for signature by ALL taxpayers Foreign Reporting Declaration
Notice of Assessment for 2020 and any Notices of Reassessment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Attach copy of any notices from CRA received in 2021 and 2022
2021 Installment payments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Indicate amount remitted to CRA: Or attach early 2022 installment notice.
New Clients ONLY: -Sign Authorization/Cancellation Request	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Please complete and sign both forms, if not previously submitted: Authorization Request Engagement Letter
-Sign Engagement Letter – outlining our mutual responsibilities to each other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
-Provide copies of prior tax returns – three years, if possible	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Attach copies of all available schedules, to ensure carry-forward balances.

Payments to Canada Revenue Agency (CRA) - Options

In-Person or Cheque Payment Options: Your bank, a Canada Post Office or by mail T7DR(A) remittance form required <i>(we provide to you with your tax return)</i>				Online and Electronic Payment Options: -Online banking at your bank – use bill payments -My Payment at CRA website – uses Interac Debit -Pre-authorized debit (PAD) via your CRA My Account
OR You can have us Efile a one-time Pre-authorized Debit (PAD) to CRA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	By request only – can be after your tax return is Efiled Form T185 signature required <i>(provided on request)</i>
Did you make any Repayments of Benefits? Verify correct allocation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Provide details so we can verify they did not go to your tax installment account. Correctly allocated repayments may not be viewable on My Account

Planned Legislation: Amounts payable to CRA over \$10,000 will require electronic payment - expected later in 2022

Koroll & Company is open and ready to help clients.
Learn more about our services for 2022.

Open PDF

← Finished with this organizer? For complete delivery instructions visit our website.
For additional worksheets see : www.koroll.ca/personal tax worksheets and forms

