

Form 1040 Supplemental Tax Organizer (2021)

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Client Name: _____

1. **Do you own a TFSA (Tax-Free Savings Account) or RESP (Registered Education Savings Plan)? If yes, please provide the December 31 statement from the investment company.**

Name of Financial Institution _____

Name of contributor _____

Name of beneficiary _____

Date on which the account was opened _____

December 31 market value _____

Income received in the year _____

2. **Do you own Canadian mutual funds, Exchange Traded Funds (ETFs) or REITs in a *non-registered* investment account (i.e. TFSAs, RESPs etc.)?**

Please provide the December 31 statement and the date of purchase of *each* fund.

Please provide the T3 slips for each fund for *each* of the prior 3 years unless on file with HP.

3. **Do you own any the following assets?**

- Life Insurance Policy with a Cash Surrender Value
- Stock Options
- Pension Plans
- Family Loans

If yes, please provide December 31 account balance.

4. **Do you own share of Canadian corporation?**

% of ownership held: _____

If ownership is greater than 50%, please provide December 31 financial statements and a copy of the Canadian corporate tax return.

5. **Are you a member of a Canadian Partnership?**

% of ownership held: _____

If ownership is greater than 10%, please provide December 31 financial statements and a copy of the Canadian corporate tax return.