

Supplemental Tax Organizer (2022)
Form 1040

Client Name: _____

1. Tax-Free Savings Account
Do you own a TFSA? If yes, please provide the December 31 financial statement.

Date on which the account was opened _____

Name of beneficiary _____

Name of contributor _____

2. Do you own the following assets?

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

Please provide the December 31 statement.

3. Are you a member of a Canadian Partnership?

% Of ownership held _____

4. Are you a shareholder in a private Canadian corporation?

% Of ownership held _____

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

5. Do you own Canadian mutual funds, Exchange Traded Funds (ETFs) or REITs in non-registered investment accounts?

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.