



U.S. TAX SERVICES INC.

2024 Supplemental Tax Organizer  
Form 1040

Client Name: \_\_\_\_\_

1. Tax-Free Savings Account

Do you own a TFSA? If yes, please provide the monthly investment statements.

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? Choose an item.

Please provide the monthly investment statements and the date of purchase of each fund.

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Please provide the T3 slips for each fund for *each* of the prior 3 years.