



Supplemental Tax Organizer (2025)  
Form 1040

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

1. Tax-Free Savings Account  
Do you own a TFSA? If yes, please provide the monthly 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(s).

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 statements and the date of purchase of each fund.

\_\_\_\_\_

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