

PERSONAL TAX ORGANIZER

Date Of Completion _____
YYYY DD MM

	D.O.B.	S.I.N.	Address	Phone No.
Name				
Spouse				
Dependent 1				
Dependent 2				
Dependent 3				
Dependent 4				

Marital Status: Married Common-Law Separated Divorced
 Widowed Single

Any Changes In Year: Yes No Date Of Change: _____

Slips	Client	Spouse	Dependent 1	Dependent 2	Dependent 3	Dependent 4
T4						
T4A						
T4AOAS						
T4AP						
T4E						
T4RIF						
RRSP						



GALLO & COMPANY
CHARTERED PROFESSIONAL ACCOUNTANTS

PERSONAL TAX ORGANIZER

Slips	Client	Spouse	Dependent 1	Dependent 2	Dependent 3	Dependent 4
T3						
T5						
T5007						
Split Pension						
Self Employment						
GST						
Rental Property						
Farm						
Employment Expense (T2200)						
Tuition (T2202)						
Disability Tax Credit (T2201)						
Investments						
Child Care Expenses						
Child/Spousal Support						
Charitable Contributions						
Charitable Contributions						



GALLO & COMPANY
CHARTERED PROFESSIONAL ACCOUNTANTS

PERSONAL TAX ORGANIZER

Notes

12415 Stony Plain Rd #6 • Edmonton, AB • T5N 3N3 • 221-65 Chippewa Road • Sherwood Park • Alberta T8A 6J7



Payment Plans To Suit Your Needs

At Gallo & Company, we understand that as individuals, you are focused on making your business work. That's why we proudly offer a number of convenient payment plan options to best suit your needs.