2015 PERSONAL INCOME TAX QUESTIONNAIRE

This questionnaire is designed to assist you in compiling the information necessary to prepare your 2015 personal tax return. Please return this form with your documentation.

Client Name: ______________________________

Please provide details of any **changes** to your personal information:

Telephone: (   ) ______________ Cell: (   ) ______________ E-mail: ______________

Address: ______________________________

Marital status, separation date (Include signed Separation Agreement): ______________

Additional dependents:

Full Name: ______________________________ Lives at same address Y / N

Relationship: ______________ Birth date: ______________ S.I.N. : ______________

Net income: ______________ Infirmity, if any: ______________

Please Check items attached:

INCOME

- ☐ Employment – T4
- ☐ Old Age Security – T4A (OAS)
- ☐ Canada Pension Plan benefits – T4A (P)
- ☐ Retirement Income – T4A for pensions, T4RSP (RRSP withdrawals), T4RIF
- ☐ Employment Insurance – T4E
- ☐ Universal Child Care Benefits – RC62
- ☐ Interest, Dividends and other Investment Income – T5/T600
- ☐ Mutual Funds and other Trust Income – T3
- ☐ Limited Partnership – T5013
- ☐ Business or Professional – See Schedule at back or provide own list
- ☐ Rental Property – See Schedule at back or provide own list
- ☐ Capital Gains/Losses (Attach annual capital gain/loss schedule from brokerage account)
- ☐ Did you dispose of any other capital properties this year? – provide details
- ☐ Spousal support payments received
- ☐ Other Income: ______________________________

DEDUCTIONS AND TAX CREDITS – attach receipts and/or details

☐ Registered Retirement Savings Plan contributions

☐ Annual union, professional dues

☐ Child care expenses
(a) For individual providers, include S.I.N. and address: ______________________________
(b) For summer camps, indicate number of weeks in camp: __________________________

☐ Allowable business investment losses

☐ Moving expenses (attach receipts). Indicate distance moved to new employment

☐ Spousal support paid (include name(s) and address(es) of recipients; attach copy of signed agreement or court order)

☐ Commission and employment expenses (include details and T2200)

☐ Carrying charges (interest on money borrowed to earn dividend and interest, investment counsel fees, interest for limited partnerships)

☐ Other deductions and expenses (e.g. EI repayments, legal fees)

☐ Federal and provincial political contributions

☐ Charitable donations. If first time donor, please specify __________________________

☐ Medical expenses and details of private health insurance premiums, including amounts paid while travelling (for you, your spouse and dependents)

☐ Disability amount for you or dependent (attach copy of disability tax credit certificate)

☐ Caregiver amount (list details of dependency) ____

☐ Children's fitness amount and arts amount (for dependents who were under age 17 at the end of the year; under 19 if eligible for disability credit). Programs must be ongoing for 8 weeks or more.

☐ Adoption expenses

☐ First time home buyers

☐ Tuition fees (attach T2202/T2202A). **DOWNLOAD THIS COMPLETED FORM BY LOGGING ON TO THE UNIVERSITY WEBSITE.**

☐ Public transit passes for you, your spouse and dependents. Must be for unlimited travel, bus tickets not allowable.

☐ Volunteer fire fighters and search and rescue volunteers

☐ Labour-sponsored funds / Equity tax credit

☐ Interest paid on student loans (must be under Canada Student loan program, student credit line not eligible)

OTHER

☐ 2015 Installments (attach CRA Statement) Total remitted: $ ________________________________

☐ Attach copy of 2014 assessment notices and other correspondence from the Canada Revenue Agency

ADDITIONAL COMMENTS YOU FEEL ARE RELEVANT:

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2015 SELF-EMPLOYED EXPENSES (T2200 NOT REQUIRED)
2015 EMPLOYMENT EXPENSES (T2200 REQUIRED)
(FEEL FREE TO USE THIS LIST OR ATTACH YOUR OWN LIST)

CAR EXPENSES:	
Gas	$
Repairs & maintenance	
Insurance	
License, registration & auto club	
Interest on bank loan for car purchase (attach loan agreement)	
Lease	
Washes & miscellaneous	
Parking, tolls & meters	
Business KMs	
Total KMS	
Allowance received from employer included on T4	
Allowance received from employer not included on T4	
If car purchased, sold or leased during year provide copy of agreement or invoice	
MARKETING & PROMOTION:	
Advertising & gifts	
Meals & entertainment	
Hotel & motel accommodation	
Travel	
Sales meetings & seminars	
GENERAL & ADMINISTRATIVE:	
Accounting and legal fees	
Office supplies and expenses	
Telephone & internet	
Professional licenses, fees & dues	
Liability insurance (errors & omissions) (Excluding life & disability)	
Equipment leases & rentals	
Professional dues & fees, memberships	
Accommodation (rent, property taxes)	
Repairs & maintenance	
Salaries & wages (not yourself)	
Interest on business line of credit, credit cards if used primarily for business purposes	
OFFICE IN THE HOME:	
Heat, electricity & water	
Repairs and maintenance (not major renovations)	
Insurance	
Property Tax	
Mortgage interest – attach annual statement from bank	
Rent	
Water	
Phone & internet	

PURCHASES OF CAPITAL ASSETS (Computers, Furniture, Equipment, etc.)- *ATTACH RECEIPTS*	

RENTAL PROPERTY INFORMATION

RENTAL INCOME EXPENSES:	
Advertising	
Insurance	
Mortgage interest (attach annual mortgage statement)	
Professional fees	
Maintenance & repairs (provide list if significant)	
Property taxes	
Utilities (heat, electricity, water)	
Other	