

2017 PERSONAL INCOME TAX QUESTIONNAIRE

This questionnaire is designed to assist you in compiling the information necessary to prepare your 2017 personal tax return. Please return this form with your documentation.

Client Name: _____

Spouse Name: _____

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

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

Address: _____

Have you sold your principal residence in 2017. If so, please provide, address, year of acquisition and proceeds of disposition. **There are significant penalties for omitting this information.**

Do you own real property or investments outside of Canada (other than investments inside RRSP/RRIF). If so please provide details. **There are significant penalties for omitting this information.**

Change in 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: _____

Additional dependents:

Full Name: _____ Lives at same address Y / N

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

Net income: _____ Infirmity, if any: _____

Additional dependents:

Full Name: _____ Lives at same address Y / N

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

Net income: _____ Infirmity, if any: _____

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, Investment Income – T5/T3
- Limited Partnership – T5013
- Business / Professional / Commission – 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 (tips, etc): _____

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 (detailed discussion required)
- 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
- 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)
- Home accessibility expenses (if 65 and over or eligible for dependent credit)
- Caregiver amount (list details of dependency)
- Eligible Educator school supply tax credit
- Adoption expenses
- First time home buyers

2016 SELF-EMPLOYED EXPENSES (T2200 NOT REQUIRED)**2016 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	
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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	