2018 PERSONAL INCOME TAX QUESTIONNAIRE

This questionnaire is designed to assist you in compiling the information necessary to prepare your 2018 personal tax return. Please return this form with your documentation.

Client Name: ____

Spouse/common law Name:_________________________________

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

Telephone: __(____)________________ Cell: __(___)_______________ E-mail: ___________________

Address: ____

Have you sold your principal residence in 2018. 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
- ☐ Interest, Dividends, other 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
- ☐ Tuition fees (attach T2202/T2202A). **DOWNLOAD THIS COMPLETED FORM BY LOGGING ON TO THE UNIVERSITY WEBSITE.**

- ☐ Labour-sponsored funds / Equity tax credit
- ☐ Interest paid on student loans (must be under Canada Student loan program, student credit line not eligible)
- ☐ Eligible Educator School Supply Tax Credit

ADDITIONAL COMMENTS YOU FEEL ARE RELEVANT:

2018 SELF-EMPLOYED EXPENSES (T2200 NOT REQUIRED)
2018 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	

PURCHASE/SALE OF RENTAL PROPERTY – ATTACH STATEMENT OF ADJUSTMENTS FROM LAWYER	