

# 2019 PERSONAL INCOME TAX QUESTIONNAIRE

This questionnaire is designed to assist you in compiling the information necessary to prepare your 2019 personal tax return. Please return this form with your documentation.

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

**Date of Birth (MM/DD/YYYY):** \_\_\_\_\_ **S.I.N.:** \_\_\_\_\_

**Spouse Name:** \_\_\_\_\_

*(Includes Common law arrangements)*

**Date of Birth (MM/DD/YYYY):** \_\_\_\_\_ **S.I.N.:** \_\_\_\_\_

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

Telephone: \_\_\_\_\_ Cell: \_\_\_\_\_ E-mail: \_\_\_\_\_

Address: \_\_\_\_\_

2. Have you sold your principal residence in 2019? If so, please provide: address, year of acquisition and proceeds of disposition. **There are significant penalties for omitting this information.**

3. 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.**

4. Change in Marital status, separation date (include signed Separation Agreement): \_\_\_\_\_

## Additional dependents:

1. Full Name: \_\_\_\_\_ Lives at same address: Y / N

Relationship: \_\_\_\_\_ Date of birth: \_\_\_\_\_ S.I.N.: \_\_\_\_\_

Net income: \_\_\_\_\_ Infirmity, if any: \_\_\_\_\_

2. Full Name: \_\_\_\_\_ Lives at same address: Y / N

Relationship: \_\_\_\_\_ Date of birth: \_\_\_\_\_ S.I.N.: \_\_\_\_\_

Net income: \_\_\_\_\_ Infirmity, if any: \_\_\_\_\_

3. Full Name: \_\_\_\_\_ Lives at same address: Y / N

Relationship: \_\_\_\_\_ Date of birth: \_\_\_\_\_ S.I.N.: \_\_\_\_\_

Net income: \_\_\_\_\_ Infirmity, if any: \_\_\_\_\_

4. Full Name: \_\_\_\_\_ Lives at same address: Y / N

Relationship: \_\_\_\_\_ Date of birth: \_\_\_\_\_ S.I.N.: \_\_\_\_\_

Net income: \_\_\_\_\_ Infirmity, if any: \_\_\_\_\_

**PLEASE CHECK THE ITEMS THAT APPLY:**

**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)
- 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)**

- 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 or 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)
  - Find form through university website.
- Interest paid on student loans
  - Must be under Canada Student loan program. *Student credit line not eligible.*
- Registered Retirement Savings Plan contributions
- Annual union, professional dues
- Child care expenses
- Allowable business investment losses **(detailed discussion required)**
- Moving expenses **(detailed discussion required)**
- 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 & T2200.
- Carrying charges **(detailed discussion required)**
  - 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
- Labour-sponsored funds / Equity tax credit

**2019 SELF-EMPLOYED EXPENSES (T2200 NOT REQUIRED)****2019 EMPLOYMENT EXPENSES (T2200 REQUIRED)**

(FEEL FREE TO USE THIS LIST OR ATTACH YOUR OWN LIST)

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
Advertising & gifts
Meals & entertainment
Hotel & motel accommodation
Travel
Sales meetings & seminars
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
<b>HOME OFFICE:</b>
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**

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