



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 if your address, contact information or family situation has changed.

***We will email you an invite to a client portal where you can upload any necessary documents for completing your tax return. We will also use this portal to send you any forms we need signed as well as a copy of your tax return once it is completed.

Client Name _____

Telephone (____) _____ Fax (____) _____ E-mail _____

Please indicate address only if changed since 2018 income tax return:

**New for 2019 – indicate if you reside outside of a census metropolitan area on Dec 31, 2019 as defined by Statistics Canada _____

Marital status (if changed in 2019, indicate change and date) _____

New family members:

Name: _____

Date of birth: _____

Date of adoption: _____

Are you missing information? Please list items expected to come:

Unless otherwise indicated, we will assume you wish to be registered with Elections Canada. To opt out, please check here _____

Please check items attached:

INCOME

Employment – T4

- Old Age Security – T4A(OAS)
- Canada Pension Plan benefits – T4A(P)
- Retirement Income – T4A for pensions, T4RSP, T4RIF
(attach details of spouse’s income to determine if pension splitting is beneficial)
- Employment Insurance – T4E
- Interest, Dividends and other Investment Income – T5/T600
- Mutual Funds and other Trust Income – T3
- Business or Professional – Financial Statements or T5013 (include all amounts from sharing economy ex Uber, Skip the Dishes)
- Crowd Funding – did you organize or manage a crowd funding campaign (ex. Go Fund Me)
- Rental Property – include amounts received from sharing economy such as Air BnB, VRBO
(attach details of income, expenses, purchases and sales. For purposes and sales please provide the statement of adjustments and the statement of receipts and disbursements)
- Capital Gains/Losses
- Did you dispose of any capital properties this year?
(attach copies of sales detail and original purchase documentation.)
- Details of the disposition of your PRINCIPAL residence, including address, year acquired and proceeds
- Alimony (provide copy of post-April 30, 1997, agreement or election, if changed or not, previously provided)
- Bitcoin or crypto currency transactions
- Other Income (e.g., stock options, annuities, scholarships, bursaries, research grants, RRSPs – attach T4RSP, Workers’ Compensation benefits)
- Did you receive interest, dividends or benefits from a business in which a relative is a key party (in terms of ownership or involvement)

DEDUCTIONS

- Registered Retirement Savings Plan contributions (attach receipts)
(attach T10 – Personal Adjustment Reversal, if you received one.)
- Annual union, professional dues (attach receipts)
- Child care expense (attach receipts):
 - (a) for individual providers, include S.I.N. and address _____
 - _____
 - (b) for summer camps, indicate number of weeks in-residence _____
- Attendant care expenses (attach receipts) – if you provided in-home care for a parent or grandparent 65 years of age or older or inform dependent relative, a federal credit may be available
- Allowable business investment losses (refer to Capital Gains/Losses above)
- Moving expenses (attach receipts). Indicate distance moved to new employment _____

- Alimony or separation allowances paid (include name(s) and address(es) of recipients; attach copy of agreement or court order for spousal support which was signed on or after May 1, 1997 or election, if changed or not, previously provided) _____
- Commission and employment expenses (include details and a signed T2200 or TL2)
- Carrying charges (interest on money borrowed to earn dividend and interest, investment counsel fees, interest for limited partnerships)
- Other deductions and expenses (attach receipts)
- Federal and provincial political contributions (attach receipts)
- Charitable donations (attach receipts)
(provide details of gifts in kind, e.g., securities) _____
- Medical expenses (attach receipts) and details of private health insurance premiums, including amounts paid while travelling (for dependents over age 18, up to \$10,000 can be transferred) – most pharmacies give a summary of all prescriptions that have been filled. This summary is preferred to separate medical receipts as this ensures all receipts have been counted for.
- Doctor prescribed medicinal marijuana expenses
- Costs related to the use of reproductive technology going back 10 years
- Disability deduction for you or dependent (if first-time claim, attach T2201 signed by physician)
- Adoption expenses
- Tuition fees (attach T2202/T2202A including amounts that can be transferred from dependants)
- Labour-sponsored funds – T5006
- Interest paid on student loans (attach reporting slip)
- Details of home purchase if you are a first time home buyer
- Apprentice tools and information if you are employed as an apprentice
- Teachers or early childhood educators, provide receipts (up to \$1,000) for eligible school supplies
- Receipts for renovations or alterations to your home to enhance mobility or reduce harm to an individual who is either eligible for the Disability Tax Credit or 65 years or older
- If you are a caregiver for any infirm family member or provide in home care for an infirm dependent relative, please provide details below:

For wholly dependent persons, please attach list and indicate for each dependant:

Name: _____

Address if different: _____

Relationship: _____

Birth date: _____

S.I.N.: _____

Net income: _____

Infirmity, if any: _____

OTHER

- 2019 Installments (attach February 2020 notice). Total remitted: \$_____
- Attach copy of 2018 Notice of Assessment notices and other correspondence from the Canada Revenue Agency
- Amount of any contributions to or distributions from, or loans to or from foreign trusts in 2019
- Details of foreign property, other than personal-use property, if aggregate cost is in excess of \$100,000, as well as any investment in "foreign affiliates"
- Details of disposal of personal use/recreation properties.

COMMENTS
