

# 2018 PERSONAL INCOME TAX QUESTIONNAIRE

Client Name \_\_\_\_\_ Have you set up direct deposit with CRA? Yes \_\_\_\_\_ No \_\_\_\_\_  
If yes, is this account still correct? Yes \_\_\_\_\_ No \_\_\_\_\_  
(new void cheque needed)

Preferred Phone \_\_\_\_\_ Email \_\_\_\_\_

Please indicate address only if changed since 2017 income tax return  
\_\_\_\_\_

Marital status (if change in 2018, indicate change and date) \_\_\_\_\_

Children born in 2018 (name, birth date) \_\_\_\_\_

These questions are on the personal income tax form. Please answer on behalf of each member of your family:

1. Did you sell your home or vacation property during the year?\* Yes \_\_\_\_\_ No \_\_\_\_\_
2. Are you a Canadian Citizen? Yes \_\_\_\_\_ No \_\_\_\_\_  
Note: If you are a U.S. citizen or dual citizen or green card holder you have a U.S. tax filing obligation. Please contact us for further information.
3. As a Canadian Citizen do you authorize CRA to provide your name, address, date of birth and citizenship to Elections Canada for the National Register of Electors? Yes \_\_\_\_\_ No \_\_\_\_\_
4. Did you own or hold **foreign property** at any time in 2018 with a total cost of more than CAN \$100,000?\*\* Yes \_\_\_\_\_ No \_\_\_\_\_

**Foreign property** includes stocks, bonds, income-producing real estate; it does not include personal use properties or foreign investments held through Canadian mutual funds.

5. Did you earn any income or realize any gains from foreign property in 2018? Yes \_\_\_\_\_ No \_\_\_\_\_
6. At any time in 2018, did you receive funds or property from, or were you, indebted to, a non-resident trust in which you were beneficially interested?\*\* Yes \_\_\_\_\_ No \_\_\_\_\_

\*If yes, please provide legal address, proceeds and year of acquisition. Failure to disclose the sale of your home or vacation property could result in large tax penalties. CRA now requires this sale to be reported even if no tax is payable.

\*\*If yes, we must complete Form T1135 or Form T1142, and it must be **signed and filed with** Canada Revenue Agency on or before the T1 due date or penalties will apply. Penalties can reach \$2,500 for each year.

Signature \_\_\_\_\_ Date \_\_\_\_\_

Please Print Name \_\_\_\_\_

Please check items that you have attached:

## INCOME

- ☐ Employment, Retiring Allowance – T4
- ☐ Old Age Security – T4A(OAS, Canada Pension Plan benefits – T4A(P) and Employment Insurance – T4E
- ☐ T4A - Pensions, Registered Education Savings Plan income, etc.
- ☐ Interest, Dividends and other Investment Income – T5/T600
- ☐ Mutual Funds and other Trust Income – T3
- ☐ Limited Partnership – T5013
- ☐ Business or Professional – Summary of income and expenses. See bottom left of our website for a link to the form.
- ☐ Do you earn income from website/webpages? See our website for more information.
- ☐ Rental Property Income (attach details of purchases and sales). See bottom left of our website for a link to the form.
- ☐ Capital Gains/Losses - Did you dispose of any capital properties this year? Please provide your gain/ loss summary for stock transactions. Attach copies of sales details and original purchase documentation for property transactions.
- ☐ Alimony received (provide copy of post-April 30, 1997 agreement or election, if changed or not previously provided)

- ☐ Other Income (e.g. stock options, annuities, scholarships, bursaries, research grants, RRSPs – attach T4RSP, T4RIF, Workers' Compensation benefits).

## DEDUCTIONS/CREDITS

- ☐ Registered Retirement Savings Plan contributions (attach receipts)
- ☐ Registered Retirement Savings Plan withdrawals under the Home Buyer Plan or the Lifelong Learning Plan (or CRA's statement of account concerning these plans, if received)
- ☐ 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 that were in-residence
- ☐ Attendant care expenses (attach receipts)
- ☐ Allowable business investment losses (refer to Capital Gains/Losses above)
- ☐ Employment related expenses – provide Form T2200 – Declaration of Conditions of Employment
- ☐ Moving expenses (attach receipts). Did you move 40km closer to a new work location?
- ☐ Alimony or separation allowances paid (include name(s) and address(es) of recipient(s); attach copy of agreement or court order for spousal support which was signed on or after May 1, 1997 or election).
- ☐ Commission and employment expenses (include details and T2200 or TL2) Note: Include cost of tools.
- ☐ Carrying charges (interest on money borrowed to earn dividends and interest, investment counsel fees, interest for limited partnerships)
- ☐ Federal and provincial political contributions (attach receipts)
- ☐ Charitable donations (attach receipts). Note: Identify donations of securities for special tax relief.
- ☐ Medical expenses (attach receipts) and details of private health insurance premiums, including amounts paid while traveling (**NOTE: Your pharmacy will provide you with a summary of all prescriptions for your family for the year**)
- ☐ Disability deduction for you or dependant (if first time claim, attach T2201 signed by physician)
- ☐ Tuition fees (attach T2202/T2202A including amounts that can be transferred from dependants) Note: These can be obtained online from most universities and colleges.
- ☐ Fees paid to an educational institution, professional association, provincial ministry or other similar institution to take an exam required to obtain professional status or be licensed to practice.
- ☐ Labour-sponsored funds - T5006
- ☐ Interest paid on student loans (attach reporting slip)
- ☐ For dependent persons, please attach list and indicate for each dependant: name, address (if different), relationship, birth date, S.I.N., and net income. Note infirmity, if any.
- ☐ Adoption expenses – new maximum is \$15,670 for each child
- ☐ Home buyers' credit – let us know if you are a first-time home buyer.
- ☐ Home Accessibility Tax Credit- age 65 and over or disabled (credit is 15% of eligible expenses up to \$10,000 per year).
- ☐ Educator school supplies Tax Credit- provide receipts up to \$1,000 and certification from school authority.

## OTHER

- ☐ 2018 Instalments (attach February 2019 notice). Total remitted: \$ \_\_\_\_\_. March 15, 2019 instalment \$ \_\_\_\_\_.
- ☐ Attach copy of 2017 Notice of Assessment
- ☐ Amount of any distributions or loans from foreign trusts received in 2018
- ☐ Receipts for property taxes or rent paid in 2018 and name of municipality or landlord, respectively – obtain receipts
- ☐ T10 slip – Pension Adjustment Reversal details