



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 attach this form to your documentation.

Client Name _____

Telephone () _____ Fax () _____ Email _____

S.I.N. _____ Date of Birth (YYYY-MM-DD) _____

Please indicate address only if changed since 2017 income tax return:

Marital status (if changed in 2018, indicate change and date) _____

New family members:

Name: _____

Date of birth: _____

Date of adoption: _____

Please check items attached:

PRINCIPAL RESIDENCE

- If you have sold your principal residence during 2018, provide copies of all documents concerning the sale. In addition, please summarize the following:

Year of acquisition: _____

Proceeds of disposition: _____

FOREIGN INCOME & PROPERTY

- Details of foreign property, other than personal-use property, if aggregate cost at any time during the year is in excess of \$100,000, as well as any investment in "foreign affiliates". Your investment advisor should be able to provide you with a foreign income and property report containing the relevant information.

INCOME

Please be sure to include all information to avoid penalties.

- 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
- Self-employment income (please attach details of income, expenses and capital purchases)
- Interest, Dividends and other Investment Income – T5/T600
- Mutual Funds and other Trust Income – T3
- Limited Partnership – T5013
- Partnership or joint venture income
- Business or Professional – Financial Statements or T5013
- Income from a profit-sharing plan
- Income from Social Assistance
- Rental Property (attach details of income, expenses, purchases and sales)

- If assets have been purchased for use in the business, or loans incurred for business purposes, provide appropriate documents

- Capital Gains/Losses – please provide brokers' annual summary

- Did you dispose of any capital properties this year? (attach copies of sales detail and purchase documentation).

- Separation allowances or child maintenance (amounts received and updated agreement, if applicable)

- Pension income from foreign sources
- Other income (e.g. stock options, annuities, scholarships, bursaries, research grants, RRSPs/RIFs – attach T4RSP, Workers' Compensation benefits).

DEDUCTIONS

- Registered Retirement Savings Plan contributions (attach receipts)
(attach T10 – Personal Adjustment Reversal, if received)
- Annual union, professional dues (attach receipts)
- Child care expenses (attach receipts)
- For individual child care providers, include S.I.N. and address

- For summer camps, indicate number of weeks in residence

- Attendant care expenses (attach receipts)
- Allowable business investment losses (refer to Capital Gains/Losses above)

- Moving expenses (attach receipts). Indicate distance moved to new employment _____
- First time home buyer
If so, date of purchase _____
- Alimony or separation allowances paid (include name(s) and address(es) of recipients; attach copy of agreement or court order if changed or not previously provided)

- Commission and employment expenses (include details and T2200 or TL2)
- Carrying charges (interest on money borrowed to earn investment income, investment counsel fees, interest for limited partnerships)
- Federal and provincial political contributions (attach receipts)
- Medical expenses (attach receipts) and details of private health insurance premiums including amounts paid while travelling
- Disability deduction for you or dependant (if first-time claim, attach T2201 signed by physician)
- Adoption expenses
- Tuition fees (attach signed T2202/T2202A including amounts that can be transferred from dependants)
- Interest paid on student loans (attach reporting slip)
- If you are a teacher or early childhood educator; provide a summary of eligible supplies to a maximum of \$1,000 in the calendar year.
- Other deductions and expenses (attach receipts)

For wholly dependent persons, indicate for each dependant (**please attach** a list if you have more than the space allowed):

Name: _____

Address if different: _____

Relationship: _____

Birth date: _____

S.I.N.: _____

Net income: _____

Infirmity, if any: _____

OTHER

- Amount of any contributions to or distributions from, or loans to or from foreign trusts in 2018.
- Indicate whether you wish to split pension income with spouse to reduce combined income tax:
 - YES
 - NO

COMMENTS
