



2020 PERSONAL INCOME TAX QUESTIONNAIRE

This questionnaire is designed to help you compile the required information to prepare your 2020 personal tax return. Please attach this form to your documentation.

Client name _____

Telephone (____)_____ Cell (____)_____ Email _____

Please indicate address only if changed since your 2019 income tax return:

Marital status (if changed in 2020, indicate change and date)

New family member(s)

Name: _____

Date of birth: _____

Date of adoption: _____

Please check that you have attached the items below, where applicable:

Ensure that you provide ALL information slips with your return. The process the Canada Revenue Agency (CRA) uses to match information slips to tax returns is very accurate. In certain circumstances, you can be penalized for unreported income at up to 20% of the unreported amounts.

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
- ☐ Income from COVID-19 benefits – T4A
- ☐ Interest, dividends and other investment income – T5, T600, T5008

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- ☐ Mutual Funds and other trust income – T3
- ☐ Limited partnership – T5013
- ☐ Partnership or joint venture income – Financial Statements or T5013
- ☐ Business or professional – Statement of income and expenses
- ☐ Income from a profit-sharing plan
- ☐ Income from Social Assistance – T5007
- ☐ Dollar amount of gratuities and tips
- _____
- ☐ 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
- _____
- ☐ Dollar amount of capital gains or losses
- _____
- ☐ Capital properties disposed of this year, if any (attach copies of sales detail and original purchase documentation.)
- _____
- ☐ Alimony (provide copy of post-April 30, 1997 agreement or election, if changed or not previously provided)
- _____
- ☐ Separation allowances or child maintenance
- ☐ Pension income from foreign sources
- ☐ Other income (e.g., stock options, annuities, scholarships, bursaries, research grants, RRSPs/RIFs – attach T4RSP, Workers' Compensation benefits).
- _____
- ☐ Withdrawals or repayments under Home Buyers' Plan or Lifelong Learning Plan
- _____

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DEDUCTIONS

- ☐ Registered Retirement Savings Plan contributions (attach receipts)
(attach T10 – Personal Adjustment Reversal, if you received one.)

- ☐ Annual union, professional dues (attach receipts)

- ☐ Professional development expenses (attach receipts)

- ☐ Child care expense (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

- ☐ 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 T2200, T2200S or TL2)
- ☐ Home office expenses:

Did you work from home more than 50% of the time for a period of at least four consecutive weeks due to COVID-19? (**Yes** or **No**)

If yes, how many working days did you work from home? _____

If using the detailed method, include details of the following expenses:

Electricity, heat, water, utilities portion of condo fees, home internet access fees, maintenance and repairs, rent paid.

For commissioned employees only: Provide expenses listed above **and** home insurance, property taxes and lease of a cell phone, computer, laptop, tablet or fax machine, etc. that relate to earning commissions income
- ☐ Carrying charges (interest on money borrowed to earn investment income, investment counsel fees, interest for limited partnerships)

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- ☐ 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

- ☐ Disability deduction for you or a dependant (if first-time claim, attach T2201 signed by physician)

- ☐ Adoption expenses

- ☐ Tuition fees (attach T2202/T2202A including amounts that can be transferred from dependants)

- ☐ If you are a senior, public transit expenses (attach receipts and passes)
- ☐ If you are a tradesperson or apprentice mechanic, tool expenses (attach receipts)
- ☐ Labour-sponsored funds – T5006
- ☐ Expenses qualifying for investment tax credits (e.g., film and video productions, resource expenditures re: mining or oil and gas)
- ☐ 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

- ☐ List the names of any wholly-dependent persons, and attach a separate sheet providing:
 - Name
 - Address if different
 - Relationship
 - Birth date
 - S.I.N.
 - Net income
 - Infirmary, if anyNames of wholly-dependent persons: _____

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OTHER

- ☐ If you have sold your principal residence during 2020, provide copies of all documents concerning the sale.

- ☐ Attach all details of your tax-free savings account(s) (TFSA)

- ☐ 2020 instalments (balance available through CRA's My Account). Total remitted:
\$ _____
- ☐ Attach copy of 2019 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 2020

- ☐ Details of foreign property, other than personal-use property, if aggregate cost at any time during the year is more than \$100,000, as well as any investment in "foreign affiliates"

- ☐ Indicate whether you wish to split pension income with spouse to reduce combined income tax:
YES: _____
NO: _____
- ☐ Indicate whether you are a U.S. citizen or Green Card holder:
YES: _____
NO: _____

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COMMENTS

[illegible]