

# McCann & Associates LLP

Chartered Professional Accountants

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## CANADIAN PERSONAL INCOME TAX QUESTIONNAIRE

- 1) How would you like to receive the client copy of your return? Paper \_\_\_\_\_ E-mail/PDF \_\_\_\_\_
- 2) For an annual fee of **\$70**, do you wish to be covered under **Audit Insurance**? The terms and conditions are disclosed on our website. Yes \_\_\_\_\_ No \_\_\_\_\_
- 3) 

	Taxpayer	Spouse
Name:	_____	_____
Address:	_____	_____
Telephone number(s):	_____	_____
E-mail address:	_____	_____
Birth Date (mm/dd/yy):	_____	_____
Citizenship:	_____	_____
SIN (Social Insurance Number):	_____	_____
Province of residence at year end:	_____	_____
HST Number (if applicable):	_____	_____
- 4) Please indicate your marital status: \_\_\_\_\_  
*(Legally married, widowed, divorced, separated, single, living common-law)*  
 If changed from previous year, please indicate when (mm/dd): \_\_\_\_\_
- 5) Did your spouse have any income during the year? Yes \_\_\_\_\_ No \_\_\_\_\_  
 If we are not preparing his/her return, please provide us with his/her net income for the year: \_\_\_\_\_
- 6) Dependent(s):
- | Name  | Birth Date (mm/dd/yy) | SIN   | Net Income: |
|-------|-----------------------|-------|-------------|
| _____ | _____                 | _____ | _____       |
| _____ | _____                 | _____ | _____       |
- 7) If you made any charitable donations, please attach a list of contributions. Similarly, please list all eligible medical expenses.
- 8) Did you make any RRSP contributions? If yes, please attach the related information slip(s) that you received from the bank. Clients who have Home Buyers Plan repayments should provide our office with details concerning required repayments. For new clients please **provide us with RRSP carry forward information as per the most recent assessment notice from CRA.**
- 9) Did you receive dividend or interest income? If yes, please attach T3, T5, or other related information slips. Yes \_\_\_\_\_ No \_\_\_\_\_
- 10) Did you have real estate rental income during 2020? If yes, please contact our office so we can provide you with our Rental Property Questionnaire.
- 11) Did you sell any real estate during 2020? If yes, please attach a summary of the property's cost, selling price, cost of renovations, and the property's address.
- 12) Did you buy or sell any securities including virtual currencies during the year? If yes, please provide the **name of security/asset, selling price, and cost** in a separate document.
- 13) If you attended university, college or any other post-secondary institution, please attach your tuition receipt (form T2202a). *Note:* If you have children that are in university, the parent may be able to claim this deduction if the child has low income.  
 If you are paying interest on a student loan, please indicate the amount paid: \_\_\_\_\_
- 14) Please provide the total amount of personal tax and GST/HST instalments paid to CRA, if any. Do not include amounts already reported on T4 or T4A slips
- |                            |                       |
|----------------------------|-----------------------|
| <b>Personal Tax:</b> _____ | <b>GST/HST:</b> _____ |
|----------------------------|-----------------------|
- 15) Were you a first time home buyer in 2020? Yes \_\_\_\_\_ No \_\_\_\_\_
- 16) Were you an employee of a company? If yes, please attach all T4 slips. Yes \_\_\_\_\_ No \_\_\_\_\_
- 17) Did you receive any Covid-19 benefits during 2020 such as CERB, CRB, CESB, etc? Yes \_\_\_\_\_ No \_\_\_\_\_

18) Were you self employed? If yes, please attach all T4As and complete the schedule below.

In addition, if you were an employee working from home please fill out the home office section if you are using the detailed method.

<b>BUSINESS INCOME</b>			
	<b>Name of Payor</b>	<b>Amount paid (including GST/HST)</b>	<b>GST/HST collected</b>
Income with T4A slips			
Income <i>without</i> T4A slips			
<b>BUSINESS EXPENSES</b> *Only GST/HST registrants should segment GST/HST paid from expenses			
<b>Amount paid (including GST/HST)</b>	<b>GST/HST paid*</b>	<b>Amount paid (including GST/HST)</b>	<b>GST/HST paid*</b>
Advertising		Local transportation	
Photos		Courier/Post	
Gifts		Prof development	
Meals		Coaching	
Business Ins	N/A	Books	
Bank charges	N/A	Publications	
Dues and fees		CD/DVD/Downloads	
Accounting		Office expenses	
Agent fees		Supplies	
Equip repairs		Theatre/viewing	
Foreign travel	N/A	Professional services	
Travel		Rentals	
Accomodation		Performance supplies	
Travel meals		Health Ins	N/A
Telephone		Subcontractors	
Cellular			
Internet			
Cable			
<b>AUTOMOBILE EXPENSES</b>			
<b>Amount paid (incl. GST/HST)</b>	<b>GST/HST paid*</b>	<b>HOME OFFICE EXPENSES</b>	
Gas		<b>Amount paid</b>	
Loan interest	N/A	Rent	
License	N/A	Mortgage interest	
Repair/Washing		Taxes	
Lease payments		Insurance	
ETR/Tolls		Repairs	
Parking		Utilities	
Car insurance	N/A		
Car make & year of purchase		Square footage of home office	
KM used for business			
Total KM driven		Total square footage of home	
<b>EQUIPMENT PURCHASED</b>			
<b>Description</b>	<b>Amount paid (incl. GST/HST)</b>	<b>GST/HST paid</b>	

- 19) If you received income from any other source not mentioned in this questionnaire, please attach all related information slip(s); if none are available, please **provide the source, amount, and tax deducted** in a separate document.
- 20) If you had child care expenses, please provide the name and address of the institution or person providing these services. Furthermore, if the child care expenses are paid to an individual, please obtain their SIN.
- 21) At any time in 2020, did you own or acquire non-Canadian investments or real estate with a total cost in excess of \$100,000 CAD? Yes \_\_\_\_\_ No \_\_\_\_\_  
 If yes, please ensure that you provide us with a year-end reporting package from your broker or the broker's contact information so that we can complete the T1135 on your behalf. Failure to complete and file Form T1135 by the due date will result in a penalty of \$2,500.
- 22) Please complete the following for the current year Ontario property tax and rent credits:
- |                      |                                 |                                 |                              |
|----------------------|---------------------------------|---------------------------------|------------------------------|
| <b>Home address:</b> | <b># of months in residence</b> | <b>Rent/property taxes paid</b> | <b>Landlord/municipality</b> |
|                      |                                 |                                 |                              |