2020 PERSONAL INCOME TAX QUESTIONNAIRE

Client Name _____ **Preferred Phone** _____

Email _____

Please indicate address only if changed since 2019 income tax return

_____

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

Children born in 2020 (name, birth date) _____

These questions are on the personal income tax form. Please answer the following questions on behalf of each member of your family:	**YES**	**NO**
1) Did you sell your home or vacation property during the year? 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.		
2) Are all family members set up for direct deposit? If yes, has CRA been notified of the most up-to-date bank account information? If no, this can be done by phone (call 1-800-959-8281), online or by mail by completing the Canada direct deposit enrolment form and mailing it to the address on the form.		
3) Are you a Canadian Citizen? If you are a U.S. citizen, dual citizen or green card holder, you have a U.S. tax filing obligation. Please contact us for further information.		
4) As a Canadian Citizen, do you authorize CRA to provide your name, address, date of birth and citizenship to Elections Canada for the National Registry of Electors?		
5) Did you own or hold foreign property at any time in 2020 with a total cost of more than CAN $100,000? Foreign property includes stocks, bonds and income producing property. It does not include foreign investments held through Canadian mutual funds or personal use properties. If yes, then Form T1135 or Form T1142 must be completed, 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.		
6) Did you earn any income or realize any gains from foreign property in 2020?		
7) At any time in 2020, did you receive funds or property from, or were you indebted to a non-resident trust in which you were beneficially interested? If yes, the Form T1142 must be completed, 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.		
8) Were you required to work from home due to Covid-19 and wish to claim the work space in home expense credit? Please advise us whether you would like to make the claim under the detailed method or the flat rate method ($2/day up to a maximum of $400). If you wish to make a claim using the detailed method, you should reach out to your employer to ensure you get a signed T2200S (this is required to make a claim using the detailed method). In addition, all supporting invoices should be kept to support the claim under the detailed method. To make a claim on your 2020 tax return, please complete Form T777S summarizing the home office expenses you incurred during the year. If you would like to make a claim using the temporary flat rate method, please advise us of the number of working days you worked from home due to the Covid-19. For more information, visit our website here.	☐ **Detailed Method?** ☐ **Flat Rate?**	

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, CERB, 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 calculation tools under Resources on our website
- □ Do you earn income from website/webpages? See our website for more information.
- □ Rental Property Income (if applicable, attach details of property purchases and sales). See Resources / forms on our website.
- □ 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 real estate 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

- □ Commission and employment expenses (include details and T2200, T2200S, T777S,TL2) Note: Include cost of tools.
- □ 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 overnight camps, indicate number of weeks that were in-residence
- □ Attendant care expenses (attach receipts)
- □ Allowable business investment losses (refer to Capital Gains/Losses above)
- □ 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).
- □ Carrying charges (investment counsel fees, interest on money borrowed to earn dividends and interest, 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.
- □ 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 $16,563 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

- □ 2020 Instalments (attach February 2021 notice). Total remitted: $ _____. March 15, 2021 instalment $_____.
- □ Attach copy of 2019 Notice of Assessment and any Reassessments or Notices received in 2020.
- □ Amount of any distributions or loans from foreign trusts received in 2020.
- □ Receipts for property taxes or rent paid in 2020 and name of municipality or landlord, respectively – obtain receipts
- □ T10 slip – Pension Adjustment Reversal details