

Kudlow & McCann

—Professional Corporation—
Chartered Professional Accountants

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PERSONAL INCOME TAX QUESTIONNAIRE

- 1) How would you like to receive the client copy of your return? Paper _____ E-mail/PDF _____
- 2) 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 date: _____
- 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 | SIN | Net Income: |
|-------|------------|-------|-------------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
- 7) If you made any charitable donations, please attach the receipts. Similarly, please attach all medical expense receipts.
- 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) If you had rental income from any source, please provide us with the rental income and expenses in a separate document.
- 11) Did you sell any real estate during 2016? If yes, please attach a summary of the property's cost, selling price, cost of any renovations, and the property's address.
- 12) Did you buy or sell any securities 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) The amount of monthly or annual Public Transit Pass charges incurred during the year (tokens are not eligible): _____
- 15) 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. **Personal Tax:** _____ **GST/HST:** _____
- 16) Were you a first time home buyer in 2016? Yes _____ No _____
- 17) Were you an employee of a company? If yes, please attach all T4 slips. Yes _____ No _____
- 18) Were you self employed? If yes, please attach all T4As and complete the schedule on page 2. Yes _____ No _____

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

- 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) In 2016, the Children's Fitness Credit and Arts Credit can be claimed to a maximum of \$500 and \$250 for each child under 16 anytime in the year. Please provide a list of these eligible expenses in a separate document.
- 22) At any time in 2016, did you own or acquire non-Canadian investments or real estate with a total cost in excess of \$100,000? 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.
- 23) Please complete the following for the current year Ontario property tax and rent credits:
- | | | | |
|----------------------|---------------------------------|---------------------------------|------------------------------|
| Home address: | # of months in residence | Rent/property taxes paid | Landlord/municipality |
| | | | |