

Kudlow & McCann

—Professional Corporation—
Chartered Professional Accountants

Website: www.kudlowmccann.com
Tel: (416) 924-4780 | Fax: (416) 924-5332

21 St. Clair Avenue East, Suite 401
Toronto, ON, M4T 1L9

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 |
| | | | |