

H&A Accounting and Tax Services Inc.

Personal Income Tax Questionnaire

We have compiled the following list of questions in order to assist us in preparing your personal tax return. Please read and carefully answer each question below:

1. Please provide us with the most up to date information as listed below:

- a. Full legal name: _____
- b. SIN: _____
- c. Gender: _____
- d. Mailing address: _____

- e. Date of birth: _____
- f. Email address: _____
- g. Home phone #: _____
- h. Cell/work phone #: _____
- i. Preferred method of contact: home phone cell/work phone email

2. Would you like your information provided to **Elections Canada**? Yes No

3. Did you own **foreign property** at any time in the year with a total combined original cost of more than \$100,000? Yes No

If yes, please provide details _____
This can include cash held outside Canada, stocks, trusts, partnerships, real estate, tangible and intangible property, contingent interests, convertible property, etc.

4. At December 31st of the current tax year, were you:

Single	Separated
Common law	Divorced
Married	Widowed

Was this the same status as you reported on your prior year tax return? Yes No

If no, what was the date of the change? _____

If you are married or common law and we are **not** preparing your spouse's tax return, please provide:

- a. Spouse's full legal name: _____
- b. Spouse's date of birth: _____
- c. Spouse's SIN # : _____
- d. Spouse's Gender: _____
- e. Spouse's taxable income for the current tax year: _____

You are considered common law if you meet one of the following conditions: have been living together for at least 12 continuous months OR are living together and have a child together or have custody of a child together.

5. Do you have any **children under the age of 18** that live with you?YesNo

If yes, please fill out their details in the chart below:

First name				
Last name				
Gender				
SIN				
Date of birth				
Is the dependant disabled or infirm?				
Was the dependent in child care during the year?				
Child care provider name or company?				
If child care provider is an individual, please provide SIN				
Number of weeks child care was provided during the year?				
Total child care cost				
Universal Child Care Benefit received for children under 6? (Please include RC62)				

If you are unsure of what can be claimed for child care please visit the following link, <http://www.cra-arc.gc.ca/tx/ndvds/tpcs/ncm-tx/rtrn/cmpltng/ddctns/lns206-236/214>

6. Please answer all the questions below. For those you answer yes, please provide us with the slips or details so we may record it appropriately.

- a. Have you included all **information slips**?YesNo

This includes T3, T4, T4A, T4A(OAS), T4A(P), T4E, T4PS, T4RIF, T4RSP, T5, T5013, and RC62. Note this is a list of common tax slips and does not include all possible slips. Some may not apply.

- b. Did you make any **RRSP** contributions for the current tax year?YesNo

Please note that the official slip is required to claim.

- c. Did you make any **charitable or political donations** in the year?YesNo

To claim charitable donation, please provide the official donation receipt which must contain the following information: indicates "this is an official receipt for income tax purposes", the name and address of charity, the date of the donation, the charity's registration number (should end in RR0001) and the amount of the donation. To claim political donation, please provide the official receipt from the political organization.

Were your dependent children involved in any extracurricular programs that may qualify for the **child fitness and art tax credits**?YesNo

*Please provide us with receipts. This includes amounts paid for programs of physical, artistic, cultural, recreational or developmental activities for children under **age 16** at any time during the year (under 18 for children with disabilities). If you are unsure as to what can be claimed please visit the following links: <http://www.cra-arc.gc.ca/fitness/>*

Are there **medical** expenses you have paid in the year for you or a dependent? Yes No

Please provide us with receipts or if possible a summary of expenses paid in the year. If you are unsure of what expenses are eligible please visit the following link: <http://www.cra-arc.gc.ca/nwsrm/txtps/2016/tfsk26-eng.html>

Did you purchase any **public transit** passes for you or your dependents?YesNo

Please provide us with the receipts/passes or a summary of amounts paid during the year. Note that this only applies to monthly/annual passes; individual tickets are not eligible.

Did you pay or receive any **alimony and/or spousal support**?YesNo

Please provide us with the total amount paid or received during the year. Please note that child support/maintenance does not apply.

Did you or any of your dependants attend a post **secondary institution**?YesNo

*Please provide the T2202, T2202A or T11A issued by the educational institution. Many educational institutions no longer mail out these slips but require you to go online and print them off.
If you would like to **transfer** any education amounts to a spouse or parent please ensure the transferor (student) signs the transfer section on the back of the T2202A that is provided to us. Please note that grade school receipts are not eligible and textbook receipts are not required.*

Did you pay any **union/professional dues** that are not reported on your T4?YesNo

Please provide us with your receipts or a summary of dues paid. If you are unsure of what union/professional dues are deductible please visit the following link, <http://www.cra-arc.gc.ca/tx/ndvdl/tpcs/ncm-tx/rtrn/cmpltng/ddctns/lns206-236/212>

Did you pay any **student loan interest**?YesNo

Please include the official tax receipt forms provided by the provincial and/or federal loan programs. Interest on student line of credits and other such loans do not apply.

7. Have you **moved** in the current year and do you meet the criteria described below?

.....YesNo

In order to qualify to deduct moving expenses you are required to have moved a minimum of 40km to move closer to your place of employment, to start new employment, to start a new business, or to attend a post secondary educational institution.

*If yes, please complete the “**Moving Expense Summary**”.*

8. Do you personally hold any investments outside of a TFSA, RRSP, or RESP? Yes No

a. If yes, did you pay any investment management fees? Yes No

Total amount of management fees paid in the year including GST _____

b. If yes, did you dispose of any holdings in the current tax year? Yes No

i. Please include details of the disposals along with the adjusted cost base of each investment disposed of so that gains and losses can be accurately calculated.

9. Did you sell any real estate or other investment assets in the year? Yes No

Please include the details of the sale and the original cost.

CRA now requires that taxpayers report the disposition of their principal residence. Please provide us with the following information for any real estate dispositions in 2016:

i. Year of purchase: _____

ii. Purchase price: _____

iii. Proceeds of sale: _____

iv. Address: _____

10. Do you have any rental properties that you hold personally? Yes No

If yes, please complete the "Rental Property Summary" for each property. If you purchased a rental property in the year please provide us with all the purchase details.

11. Do you have self employment income(not earned in a corporation)? Yes No

If yes, please complete the "**Self-Employed Business Summary**" and answer the questions below:

a. Are you a GST registrant? Yes No

If yes, would you like us to prepare and file your GST return? Yes No

i. Please send in the GST form that CRA mailed to you.

ii. Are you an annual or quarterly filer? _____

iii. What is your CRA GST registration #: _____

b. Do you have Internet business activities? Yes No

<http://www.cra-arc.gc.ca/selfemployed/>

12. If you or your spouse received **pension income**, should we optimize your combined tax refund or payable as a couple by splitting your pension income? Yes No

13. Do you or any of your dependents have a disability? Yes No

Please provide Form T2201 - disability tax credit certificate completed by your doctor if you have not previously provided it to us. If you are unsure if you or your dependent qualifies please visit the following link: <http://www.cra-arc.gc.ca/E/pbg/tf/t2201/README.html>

If yes, have you incurred renovations to your dwelling to enhance mobility or reduce risk of harm for an individual who is either eligible for the Disability Tax Credit or 65 years of age or older? If yes, you may be eligible for the Home Accessibility Tax Credit. Please provide details of the renovations including type of renovation and amount paid.

14. Are you a **first-time home buyer** in 2018? Yes No

If yes, please provide the purchase date _____

A tax credit based on \$5,000 (@15% = \$750) is available for qualifying homes acquired after January 27, 2009.

15. Are you a U.S. citizen, Green Card Holder, citizen of any other country or were you, or your parents born in the United States? Yes No

If yes, you may have other filing obligations and should contact us for more information.

16. Are you eligible to claim **employment expenses**? Yes No

*Please provide us with a completed and signed T2200 from your employer and fill out the **"Employment Expense Summary"**.*

17. Are you a teacher or early childhood educator? Yes No

Please provide any receipts (up to \$1000) for eligible school supplies purchased to be used or consumed in the school or regulated child care facility. Examples are construction paper, art supplies, durable goods such as games, puzzles, books, educational software ect. In addition, please provide certification from your employer attesting to the eligible supplies expense.

18. Have you spent 200 hours acting as a volunteer firefighter or a search and rescue volunteer?

Yes No

You may be eligible for a federal tax credit.

19. Have you provided us with a copy of your 2017 personal tax return (if prepared by someone other than us), 2017 Notice of Assessment and any other correspondence from Canada Revenue Agency (CRA)? Yes No

If your return was prepared by someone other than us please include your prior year invoice so we may review for deductibility on your current year return.

20. Have you signed the following documents:

T183 – Consent for us to electronically file your return

Engagement letter

T1013 – Authorization for us to deal with CRA on your behalf (**only for new clients**)

21. In what form would you like your tax return provided to you?

Paper

Electronic copy on USB card

To the best of my knowledge the above information is accurate and complete.

Signed: _____ **Dated:** _____

How would you like your tax return and records:

Held for pickup (please bring debit, credit card or cheque with you to clear invoice at pickup)

Mailed

Please provide credit card information for invoice:

Type of card: Visa Mastercard

Credit Card Number: _____

Expiry date: _____

Name on Card: _____

I authorize **H&A Accounting & Tax Services Inc.** to charge my credit card for my current year personal tax services invoice.

Signature for Credit Card: _____

Date: _____

Direct Deposit

CRA is phasing out providing refunds by cheque. If you are not set up for direct deposit with CRA, please complete the information below:

Branch #: _____ (5 digits)

Institution #: _____ (3 digits)

Account #: _____ (9-12 digits)

Name on Account: _____