

Thornton & Co.
Income Tax Questionnaire

Name: _____

Date: _____

Have you moved in the last year?

☐ yes ☐ no

If yes, new address: _____

If yes, sold house for: _____, bought **old** house for and year bought in: _____

Are you renting an apartment or condo?

☐ yes ☐ no, I own my home

First time home buyer?

☐ yes ☐ no

Do you live in an assisted living facility now?

☐ yes ☐ no

Has your marital status changed in the last year?

☐ yes - Explanation: _____ ☐ no

Do you have shared custody of your child?

☐ yes ☐ no

Who is claiming the kids this year: _____

Have you had a new baby in the last year?

☐ yes ☐ no

If yes, provide name, sex, and date of birth: _____

Do your children attend daycare or after-school care?

☐ yes ☐ no

Do you have children completing post-secondary education?

☐ yes ☐ no

Will there be a tuition transfer from child to parent?

☐ yes ☐ no

Did you graduate in the last year?

☐ yes ☐ no

Did you subscribe to Winnipeg Free Press online?

☐ yes ☐ no

Are we filing your GST for you (self-employed only, need NETFILE code)

☐ yes ☐ no

Are you claiming the Disability or Primary Caregiver Tax Credit?

☐ yes ☐ no

If yes, which one? _____

Did you retire in the last year?

☐ yes ☐ no

Did you work from home/claiming employment expenses?

☐ yes ☐ no

(T2200 required or # of days at home if relating to covid)

Did you trade or sell shares on the stock market?

☐ yes ☐ no

Do you have broker fees paid & Gain/Loss Report?

☐ yes ☐ no

Do you have foreign investment income over \$100,000?

☐ yes ☐ no

Did you sell a cottage in the last year?

☐ yes ☐ no

Do you own a vacation home in the US?

☐ yes ☐ no

Do you rent out this home?

☐ yes ☐ no

Do you have all of your income and donation slips?

☐ yes ☐ no

*If you are a new client, we require date of birth for those we are preparing taxes for or in your household under age 18. Thank you for taking the time to fill this out. This information will help us with the accurate completion of your personal tax return.