

Thornton & Co.

Name: _____

Income Tax Questionnaire

Date: _____

Have you moved in the last year?

☐ Yes ☐ No

If yes, new address: _____

Sold house for: \$_____, Bought old house for: \$_____. Lived there for _____ years.

Are you renting an apartment or condo?

☐ Yes ☐ No

First-time-home-buyer?

☐ Yes ☐ No

Do you live in assisted living facility now?

☐ Yes ☐ No

Has your marital status changed in the last year? Explanation: _____

☐ Yes ☐ No

Do you have shared custody of your child/children?

☐ Yes ☐ No

Who is claiming the child/children this year? _____

Have you had a new baby in the last year?

☐ Yes ☐ No

If yes, provide name, sex, and birthdate: _____

Do your children attend daycare or afterschool care?

☐ Yes ☐ No

Do you have children completing post-secondary education? If yes, provide the T2202.

☐ Yes ☐ No

Will there be a tuition transfer? Please note: the child must use T2202 if they have income.

☐ 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 (self-employed only & please provide NETFILE code): _____

☐ Yes ☐ No

Are you claiming 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? If yes, provide T2200.

☐ Yes ☐ No

Did you trade or sell shares on the stock market?

☐ Yes ☐ No

Do you have broker/management fees paid and 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 it out?

☐ Yes ☐ No

Did you get the 2025 HATC?

☐ Yes ☐ No

Do you have all of your income, medical receipts, 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 of 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. Please return this document to us via Portal or in person.

This document should be given to us at the same time as your tax documents*