

Tax Interview Questionnaire

Federal

Date:

Do you own foreign property overseas over 100,000 value?

How many members are in family?

Income

- Employment Income (T4)
- Pension Income (T4A, T4A(p), T4RIF, T4RSP)
- Investment Income (T5)
- Income from Employment insurance (T4E)
- Social assistance (T5007)
- Sales of securities (Stokes/bonds) (T5008)
- Business activity e.g. Uber eats, Skip da dish (Annual summary report or Calculation sheet)
- Rental Income e.g. Airbnb or House rental (Calculation sheet)

Deductions

- Trade people & apprentice tool purchase
- Declaration of the conditions of employment form (T2202)
- TL2 meals & lodging for transportation employees
- Expenses not reimbursed by employers to do job duties
- First time homebuyer
- RRSP/FHSA Contributions
- Medical or Private health insurance plan payments (super visa insurance)
- Donations- Charity or political party
- Professional membership and union dues
- Legal fee paid for – wage recovery, child support or spousal support.
- Childcare (day care) receipts.
- Moving expenses (over 40 km toward your work or study location)
- Spousal support payments (Money gram or western union)
- Tuition education fee credit (T2202A or trade school Invoice)
- Adoption expense
- Disability tax credit for self, dependent (child, parent, close relative)
- Volunteer firefighter amount
- Caregiver amount for (child, grandchild or relative)
- Labour-sponsored funds or venture capital tax credit

Taxpayer Name: _____

Taxpayer Signature: _____

Tax Interview Questionnaire

Provincial

Saskatchewan

- Legal suit in basement of back yard
- Graduate Retention program certificate (GRP)

Alberta

Ontario

- Rent payment receipts to landlord
- Staycation credit

British Columbia

- Farmer food donation tax credit
- Employee share ownership tax credit (ESOP)
- Loggin tax credit.
- Renters tax credit
- BC clean building tax credit

Manitoba

- Rent payment receipts to landlord
- Education property tax credit for homeowners
- Fitness credit for young adults <25
- Children Art amounts
- Senior's school tax rebate

Nova Scotia

- Innovation tax credit
- Equity investment credit
- Farmer food bank donation credit

Taxpayer Name: _____

Taxpayer Signature: _____

Tax Interview Questionnaire

New Brunswick

Taxpayer Name: _____

Taxpayer Signature: _____