

Sladen *SM* Moore

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*providing professional services through a corporation

2018 PERSONAL INCOME TAX QUESTIONNAIRE

This questionnaire is designed to help you compile the required information to prepare your 2018 personal tax return. Please attach this form to your documentation.

Client name _____

Telephone (____)_____ Fax (____)_____ Email _____

Please indicate address only if changed since your 2017 income tax return:

Marital status (if changed in 2018, indicate change and date) _____

New family member(s)

Name: _____

Date of birth: _____

Date of adoption: _____

Please check that you have attached the items below, where applicable:

Ensure that you provide ALL information slips with your return. The process the Canada Revenue Agency (CRA) uses to match information slips to tax returns

is very accurate. In certain circumstances, you can be penalized for unreported income at up to 20% of the unreported amounts.

INCOME

Employment - T4

Old Age Security - T4A(OAS)

Client Name _____

- Canada Pension Plan benefits – T4A(P)
- Retirement Income – T4A for pensions, T4RSP, T4RIF
(attach details of spouse's income to determine if pension splitting is beneficial)
- Employment Insurance – T4E
- Interest, dividends and other investment income – T5/T600

INCOME (cont'd)

- Mutual Funds and other trust income – T3
- Limited partnership – T5013
- Partnership or joint venture income – Financial Statements or T5013
- Business or professional – statement of income and expenses
- Income from a profit-sharing plan
- Income from Social Assistance
- Rental property (attach details of income, expenses, purchases and sales)

- If assets have been purchased for use in the business, or loans incurred for business purposes, provide appropriate documents

- Dollar amount of capital gains or losses

- Capital properties disposed of this year, if any (attach copies of sales detail and original purchase documentation.)

- Alimony (provide copy of post-April 30, 1997 agreement or election, if changed or not previously provided)

- Separation allowances or child maintenance
- Pension income from foreign sources
- Other income (e.g., stock options, annuities, scholarships, bursaries, research grants, RRSPs/RIFs – attach T4RSP, Workers' Compensation benefits).

- Withdrawals or repayments under Home Buyers' Plan or Lifelong Learning Plan

Client Name _____

DEDUCTIONS

- Registered Retirement Savings Plan contributions (attach receipts) (attach T10 – Personal Adjustment Reversal, if you received one.)

- Annual union, professional dues (attach receipts)

- Child care expense (attach receipts):
 - for individual child care providers, include S.I.N. and address

 - for summer camps, indicate number of weeks in-residence

- Attendant care expenses (attach receipts)

- Allowable business investment losses (refer to Capital Gains/Losses above)
- Moving expenses (attach receipts). Indicate distance moved to new employment

- Alimony or separation allowances paid (include name[s] and address[es] of recipients; attach copy of agreement or court order for spousal support which was signed on or after May 1, 1997, or election, if changed or not previously provided)

- Commission and employment expenses (include details and T2200 or TL2)
- Carrying charges (interest on money borrowed to earn investment income, investment counsel fees, interest for limited partnerships)

- Other deductions and expenses (attach receipts)

- Federal and provincial political contributions (attach receipts)

- Charitable donations (attach receipts) (provide details of gifts in kind, e.g., securities)

- Medical expenses (attach receipts) and details of private health insurance premiums, including amounts paid while travelling

Client Name _____

DEDUCTIONS (cont'd)

- Disability deduction for you or a dependant (if first-time claim, attach T2201 signed by physician)

- Adoption expenses

- Tuition fees (attach T2202/T2202A including amounts that can be transferred from dependants)

- Labour-sponsored funds – T5006
- Expenses qualifying for investment tax credits (e.g., film and video productions, resource expenditures re: mining or oil and gas)
- Interest paid on student loans (attach reporting slip)
- If you are a teacher or early childhood educator, provide a summary of eligible supplies to a maximum of \$1,000 in the calendar year

- List the names of any wholly-dependent persons, and attach a separate sheet providing:
 - Name
 - Address if different
 - Relationship
 - Birth date
 - S.I.N.
 - Net income
 - Infirmity, if any

Names of wholly-dependent persons: _____

OTHER

- If you have sold your principal residence during 2018, provide copies of all documents concerning the sale.

- Attach all details of your tax-free savings account(s) (TFSA)

Client Name _____

OTHER (cont'd)

- 2018 instalments (balance available through CRA's My Account). Total remitted:
\$ _____
- Attach copy of 2017 assessment notices and other correspondence from the Canada Revenue Agency

- Amount of any contributions to or distributions from, or loans to or from foreign trusts in 2018

- Details of foreign property, other than personal-use property, if aggregate cost at any time during the year is more than \$100,000, as well as any investment in "foreign affiliates"

- Indicate whether you wish to split pension income with spouse to reduce combined income tax:
YES: _____
NO: _____
- Indicate whether you are a U.S. citizen or Green Card holder:
YES: _____
NO: _____

