

Client Name(s) _____ Tax Year _____

QUESTIONNAIRE

This questionnaire is designed to assist you in compiling the information necessary to prepare your personal income tax return. Please return this form with your documentation. **Please check items that you have attached:**

INCOME

- Employment - T4
- Old Age Security - T4A(OAS)
- Canada Pension Plan benefits - T4A(P)
- Other Pensions - T4A
- Employment Insurance - T4E
- Interest, Dividends and other Investment Income - T5/T600
- Mutual Funds and other Trust Income - T3
- Limited Partnership - T5013
- Business, Professional, or Farming financial statement(s) or records; if you are entitled to claim Business Use of Home Expenses or Vehicle Expenses, we have a worksheet/checklist to assist you in gathering the applicable details required
- Rental Property (attach details of income, expenses, purchases and sales)
- Capital Gains/Losses
- Did you dispose of any capital properties this year?
(Attach copies of sales detail and original purchase documentation. Ensure date of sale is noted.)
- Alimony (provide copy of post-April 30, 1997 agreement or election, if changed or not previously provided)
- Other Income (e.g., stock options, annuities, research grants and bursaries, RRSPs - attach T4RSP, Workers' Compensation benefits).

DEDUCTIONS

- Registered Retirement Savings Plan contributions (attach receipts)
 - Annual union, professional dues (attach receipts)
 - Child care expense (attach receipts)
(a) for individual providers, include Social Insurance Number and address
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- (b) for summer camps, indicate number of weeks that were in-residence
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- 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 dividend and interest, investment counsel fees, interest for limited partnerships, safety deposit box)
 - Other deductions and expenses (attach receipts)
 - Federal and provincial political contributions (attach receipts)
 - Charitable donations (attach receipts)
 - Medical expenses (attach receipts) and details of *private* health insurance premiums, including amounts paid while traveling

(Over)

DEDUCTIONS CONTINUED

- Disability deduction for you or dependant (if first time claim, attach T2201 signed by physician)
 - Tuition fees (attach T2202/T2202A including amounts that can be transferred from dependants)
 - Labour-sponsored funds - T5006
 - Interest paid on student loans (attach reporting slip)
 - For wholly-dependent persons, please list and indicate for each dependant: name, address if different, relationship, birth date, Social Insurance Number, and net income. Note infirmity, if any.
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- If applicable, who will claim the Child Tax Benefit, GST and BC Tax Credits?

OTHER

- Total instalments made during the year (attach copy of latest notice). Total remitted: \$ _____
- Attach copy of last year's assessment notice(s)
- Attach details of RRSP Home Buyers' Plan or Lifelong Learning Plan withdrawals and/or CRA's (formerly Revenue Canada) Statement of Account concerning these plans, if received
- Amount of any distributions or loans from foreign trusts received during the year
- Details of foreign property, other than personal use property, if aggregate cost is in excess of \$100,000.
- To change or add Direct Deposit of refunds, please provide us with a cancelled cheque and indicate which of the following this applies to: tax return, GST, Child Tax Benefits

COMMENTS

NEW CLIENTS ONLY: Could you please tell us why you chose Kalsbeek & Company, CGA to prepare your personal income tax returns? (Newspaper ads, newspaper Tax Tips articles, radio Tax Tips, yellow pages ads, referral by a friend or relative, other)

If referred, who may we thank for this referral?

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