

THE GOOD STEWARD

FINANCIAL PLANNING AND ACCOUNTING SERVICES

PERSONAL INCOME TAX QUESTIONNAIRE

1. How would you like to receive the client copy of the return? Paper ___ Email/PDF ___

2. Personal Information

	Taxpayer 1	Taxpayer 2
Name		
Street Address		
City		
Province		
Postal Code		
Telephone number:		
Email		
Date of Birth (YYYY/MM/DD)		
Citizenship		
Social Insurance Number (SIN)		
Province of Residence at year-end		

3. Please indicate your marital status _____
(Single, Married, Common-Law, Divorced, Separated, Widowed)

a. If changed from the previous year, indicate date of change: _____

4. Did your spouse have any income during the year? Yes ___ No ___

a. If we are not preparing his/her return, please provide their net income for the year.

5. Dependents:

Name	Date of Birth	SIN	Net Income

6. Please attach a list of all charitable donations.

7. Please attach a list of all eligible medical expenses.

8. Did you have any RRSP contributions? If yes, please attach the related information slips received.

a. Did you make Home Buyers Plan repayments in 2018? If yes, please provide us with the details concerning required repayments.

b. Please provide us with RRSP carry forward information per the most recent Notice of Assessment from CRA. (If you have not completed the authorization form to allow us to access your information online.)

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9. Did you receive dividend or interest income? If yes, attach T3, T5 or other related information. Yes _____
10. Did you have real estate rental income in 2018? If yes, please contact us for our Rental Property questionnaire. Yes _____
11. Did you sell any real estate in 2018? Yes _____
12. Did you buy or sell securities during the year? Yes _____
13. If you attended university, college or any other post-secondary institution, please attach your tuition receipt (form T2202a). Note: If you have children in that are attending post-secondary education, the parent may be able to claim this deduction if the child has low income.
14. If you are paying interest on a student loan, please indicate the amount paid: _____
15. Please provide the total amount of personal tax and GST/HST installments paid to CRA, if any. Do not include amounts already reported on T4 or T4A slips. **Personal Tax** _____
GST/HST _____
16. Were you a first-time home buyer in 2018? _____ Yes _____
17. Do you have other income not already reported? If yes, provide the **source, amount, and tax deducted** in a separate document.
18. Did you have child care expenses in 2018? Yes ___ Amount _____
19. Did you own or acquire any non-Canadian investments or real-estate in 2018 with a total cost in excess of \$100,000? Yes _____ No _____
20. Please provide the following for the current Ontario property tax and rent credits.

Home address	# months	Rent/Property taxes paid	Landlord/Municipality

21. If you have business income? Yes _____ or farming income? Yes _____. We will contact you to complete the necessary income statements.