



2023 PERSONAL INCOME TAX QUESTIONNAIRE

This questionnaire is designed to assist you in compiling the information necessary for us to prepare your 2023 personal tax return. Please return this form with your documentation (Note: please scan and email your information to us if possible).

Client Name: _____

Tel: _____ Fax: _____ E-mail: _____

Address: (if changed since 2022):

Street: _____ Province: _____ Postal Code: _____

Marital status (if changed in 2023, indicate change and date)	
For wholly-dependent persons and new born children, please attach list and indicate for each dependant: name, address if different, relationship, birth date, S.I.N., and net income. Note infirmity, if any.	
Please check items that you have attached or which is applicable:	
INCOME	
	Employment - T4's
	Old Age Security - T4A(OAS)
	Canada Pension Plan benefits - T4A(P)
	Other Pensions - T4A
	Employment Insurance - T4E
	Universal Child Care Benefits - RC62
	Interest, Dividends and other Investment Income T5/T600
	Mutual Funds and other Trust Income - T3
	Limited Partnership - T5013
	Business or Professional - Financial Statements or T5013
	Rental Property (attach details of income, expenses, purchases and sales)
	Capital Gains/Losses (attached realized gain/loss report -ask your broker if you have not received one)
	Did you dispose of any capital properties this year? (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)
	Other Income (e.g., stock options, annuities, scholarships, bursaries, research grants, RRSPs -attach T4RSP, Workers' Compensation benefits).

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Please check items that you have attached or which is applicable:	
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)
	(a) for individual providers, include S.I.N. and address
	(b) for summer camps, indicate number of weeks they were in-residence
	Note: Child Fitness and Child Art credit were eliminated in 2017
	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 (>40km). There are a significant amount of expenses which qualify so please call us to discuss.
	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)
	Carrying charges (interest on money borrowed to earn dividend and interest, investment counsel fees, interest for limited partnerships)
	Employer signed form T2200 required if claiming employment expenses. The following are some potential expenses if your employer does not reimburse you.
	a) Car travel to client (this does not include travel to office)
	b) Cell phone if used for work purposes
	c) Home office if working > 50% from home and also option if required do to Covid restrictions – certain expenses limited depending if you earn commission income.
	d) Meals and entertainment for commission employee
	Federal and provincial political contributions (attach receipts)
	Charitable donations (attach receipts)
	Provide details of donations of securities)
	Medical expenses (attach receipts) and details of private health insurance premiums, including amounts paid while travelling (for dependants over age 18, up to \$10,000 can be transferred). To avoid duplication of claims and the retrieval of multiple receipts, you may wish to obtain an annual summary from your service provider
	Disability deduction for you or dependant (if first time claim, attach T2201 signed by physician) Can go back 10 years if you think you qualify, this can be very significant.
	Adoption expenses
	Tuition fees (attach signed T2202/T2202A including amounts that can be transferred from dependants)
	Interest paid on eligible student loans (OSAP) (attach reporting slip)
	Rent/property tax paid in the year if income less than approx..\$30,000.00



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Please check items that you have attached or which is applicable:	
Proprietorship/self employed: Schedule 2125	
	Please include your financial information for your business from Jan 1, 2023 to December 31, 2023. (amounts should not include HST if you are HST registered)
	Please include rental income from property owned personally with related expenses.
OTHER	
	2023 Installments . Total remitted: \$ _____ (include receipts if possible)
	Sale of principal residence information – Cost, year bought, sale price, date sold
	Attach copy of 2022 assessment notices
	Amount of any distributions or loans from foreign trusts received in 2023
	Details of foreign property, other than personal use property, if aggregate cost is in excess of \$100,000. – Note this includes investments i.e. shares of Apple. This does not include investments in a RRSP or TFSA
	HST information if you need us to file your HST return for the fiscal year
	Whether you need to file a US tax return as a US citizen.

YOUR COMMENTS REGARDING TAX SITUATION FOR 2022.