2020 Personal Income Tax Return Questionnaire
Todd Larson & Associates Inc.

Questions? Phone – 250-847-3939 or email: office@larsonaccounting.ca

Section 1: Personal Information

Please print clearly.	Taxpayer	Spouse (if applicable)
Full Name		
SIN		
Birth Date (MM-DD-YYYY)		
Preferred Title (Circle)	Title: Mr / Mrs / Ms / Miss / Other:	Title: Mr / Mrs / Ms / Miss / Other:
Email Address **		
**We will contact all clients by email unless indicated otherwise. If Contact by Phone Preferred, indicate best phone #:		
Phone (Home)		
Phone (Cell)		
Mailing Address including postal code		

Marital Status: ❑ Married ❑ Single ❑ Common-law ❑ Separated ❑ Divorced ❑ Widowed

If your marital status changed during the year, please indicate date of change: ____________________(MM-DD-YYYY)

Please list all dependents of you and/or your spouse: **(If separated or divorced, custody agreement required)**

Name	Relationship	Birth Date (MM-DD-YYYY)	SIN	Does child normally reside with you? Y/N	Child's Earned Net Income	Tax Return to be processed? Y / N
						(If **yes, attach receipts**)

Are dependent children living with you full time? ❑ Yes ❑ No; if no, provide details:______________________________

Did the taxpayer immigrate to Canada or immigrate from Canada during the year? ❑ Yes ❑ No

If yes, provide: Date of entry into Canada (MM-DD-YYYY) _______________ **OR** Date of departure:_________________

Did one of the taxpayers become deceased during the year? ❑ Yes ❑ No; if yes, please provide a copy of the will and death certificate.

Section 2: Canada Revenue Agency Questions

1. Are you a Canadian citizen? ❑ Yes ❑ No; is your spouse/partner a Canadian Citizen? ❑ Yes ❑ No
2. The taxpayer(s) authorizes the CRA to provide his/her name, address, date of birth and citizenship to Elections Canada to update his/her information on the National Register of Electors?
   Taxpayer ❑ Yes ❑ No; Spouse/Partner ❑ Yes ❑ No
3. Did any taxpayers own or hold foreign property with a total cost greater than CAD$100,000 any time during the year?
   ❑ Yes ❑ No If yes, provide details: ______________________________
4. Would you like to receive tax correspondence electronically from CRA via the My Account service? Any future correspondence eligible for online delivery will no longer be printed and mailed. Notifications from CRA that documents are available will be sent to the above email addresses. Taxpayer: ❑ Yes ❑ No ❑ Already registered Spouse/Partner: ❑ Yes ❑ No ❑ Already registered
5. Do you hold a tax free savings account? ❑ Yes ❑ No
6. Does your spouse/partner hold a tax free savings account? ❑Yes ❑No
7. Did you sell/have change of use or move in/out of your principal residence in 2020? ❑Yes ❑No; if yes and property was sold, please provide us with the sale agreement of disposition and original year of purchase and original purchase price. If change of use, please fill out the Principal Residence Change in Use form.
8. Did you or your spouse receive any income under the Indian Act? ❑Yes ❑No, if so, provide details:

Section 3: T1 Processing

Our office processes returns based on due date (Personal only returns Due April 30th vs Small Business returns Due June 15th), then on a first-come, first serve basis once all information is received. **We will email you, unless requested otherwise, once return is completed and ask that you call our office to book an appointment for signing.** Most personal only returns will be processed within 10 business days once all information is received.

Section 4: Income

Please indicate which of the following sources of income apply to you or a family member. Enclose all original tax and other information slips:

❑ **Employment –** T4, **Employment related – T4A –** (scholarships, bursaries, COVID-19 benefits, other), **Employment insurance – T4E, T5007-WCB.** Please note on T4 or T4A slips if the income reported was deposited to a corporate bank account instead of your personal bank account.

Did you collect CERB or CRB in 2020? ❑Yes ❑No; if so, provide the periods that you collected:

❑Mar 15-Apr 11 ❑Apr 12-May 9 ❑May 10-Jun 6 ❑Jun 7-Jul 4 ❑Jul 5-Aug 1 ❑Aug 2-Aug 29 ❑Aug 30-Sep 26

❑Sep 27-Oct 10 ❑Oct 11-Oct 24 ❑Oct 25-Nov 7 ❑Nov 8-Nov 21 ❑Nov 22-Dec 5 ❑Dec 6-Dec19 ❑Dec 20-Jan 2

❑ ***Do you have any income earned outside of Canada?*** ❑Yes ❑No; if so, provide particulars:

❑ ***Business or professional income:*** Please provide income and expense information and/or supporting documents. If you have any questions in regards to deductible expenses, please email our office.

❑ ***RRSP withdrawals:*** T4RSP or RRIF payments/withdrawal

❑ ***Investment income***: T3, T5, T5008, limited partnerships or other tax shelters - T5013 Please provide all supporting documentation received, especially any statement of investment income accompanying T3 or T5 slips.

❑ ***Summary of capital gains or losses during the year***: Capital gains and losses arise upon the disposition of assets including shares, trust units, mutual fund units, bonds, and other real property such as a vacation or rental property. For assets disposed of in 2020, please provide purchase information including purchase date, original cost, and foreign exchange rate at time of purchase (if applicable). Please also provide information about the sale including the date, proceeds of disposition, and rate of foreign exchange (if applicable). For investments, this information can be provided by obtaining a statement of security dispositions from your investment advisor. Please provide the statement of adjustments for purchases and/or dispositions of real property. **Sale of your principal residence MUST be included on your return on year of sale effective 2016 as noted on page 2, question 7.**

❑ ***Rental income:*** Please provide income and expense information and/or supporting documents. If you purchased or sold a rental property during the year, please include the statement of adjustments for the transaction.

❑ ***Spousal support:*** Please provide the amount of spousal support payments received during the year.

❑ ***Any other sources of income:*** Please provide details and/or explanations, ie – commissions, tips, gratuities, etc.

Section 5: Deductions

Please indicate which of the following deductions apply to you or a family member. Enclose all original tax reporting and other information slips supporting these deductions.

- ☐ ***RRSP contributions:*** Provide receipts for RRSP contributions for the year. **Please remember to include any contributions made in January or February 2021; if you have contributions deducted from your payroll, you should receive a Jan/Feb 2021 receipt.** In addition, if you or a family member has participated in the homebuyers' plan, please provide the annual statement or details of the withdrawal.
- ☐ ***Carrying costs related to investment income:*** Please list all investment counsel fees, interest paid on investment loans per financial institution and overdraft interest paid on broker accounts. Please also provide copies of all supporting documentation received from the investment broker.
- ☐ ***Union and professional dues:*** Please provide receipts showing amounts paid during the year. Please note that dues must have been paid personally, and not by an employer or partnership, to be deductible.
- ☐ ***Employment expenses:*** If your employment contract required you to pay expenses for which you did not receive an allowance from your employer, you may claim certain expenses. Please provide details and a signed form T2200 from your employer.
- ☐ ***Home office expenses due to COVID-19:*** If you were required to work from home due to COVID-19, please visit our website or request a copy of our 2020 COVID-19 Home Office Tax Deductions summary to determine your eligibility to claim home office expenses and find out what information we require.
- ☐ ***Childcare expenses:*** If payments are made to an individual, please include the name and social insurance number of the childcare provider. Please also include receipts for summer camps attended by your child.
- ☐ ***Spousal support:*** Please provide the amount of spousal support payments made during the year (attach agreement and any amendments) Please note that child support is no longer deductible to the payer if the agreement was made or varied after April 30, 1997.
- ☐ ***Moving expenses:*** If you moved more than 40 km to be closer to a place of employment or study, then please provide supporting details and receipts for your moving expenditures and ask for moving expense form to be completed. We now require a letter from your new employer stating that you have not been reimbursed for your moving expenses.
- ☐ ***Home-based business expenses:*** If you are operating your small business out of your home, there are certain home expenses that are deductible based on the square footage of your home vs the square footage of your home office. Receipts for all deductions must be available if audited.

Section 6: Tax Credits

Please indicate which of the following tax credits apply to you or a family member. Enclose all information slips to support these tax credits.

- ☐ ***Medical expenses:*** For expenses other than prescription drugs, please include all receipts in respect of your immediate family, net of insurance reimbursement. Please also provide the premiums paid for private health insurance, if any. For prescription drugs, please have your pharmacy print a listing of all prescriptions showing the amounts that you paid in 2020; only provide receipts for prescription drugs not already included on the pharmacy listing. Medical expenses must show name of patient, amount paid, who the payment was made to and a description of the expense.
- ☐ ***Medical Travel:*** Please provide a letter from your primary doctor stating the reason it was necessary for you to travel out of town for medical services including name of patient, dates, medical tests required and/or the name of the medical doctor you were referred to, as applicable. If a companion was medically necessary must be included in the letter to claim any expenses beyond those of the patient. We use the simplified method for food and fuel; however, we do need copies of receipts for accommodations, transportation, parking, taxis, etc.
- ☐ ***Charitable or political donations:*** Please include any charitable donation slips that pertain to the current or the prior five years that have not been claimed for tax purposes. We require the "Official Receipt for Income Tax Purposes" for all receipts.
- ☐ ***Tuition and education:*** Please provide form T2202A from educational institutions in Canada. Where tuition fees are paid to a qualifying institution outside Canada, Form TL11A should be filled out and signed by a representative of the foreign university. Please sign the T2202A or TL11A in the section designating a transfer to a spouse or parent, if applicable.
- ☐ ***Interest on student loans:*** Interest on student loans administered under either the Canada or a Provincial Student Loans Program qualifies for a tax credit. Interest paid for any other indebtedness, such as bank loans or lines of credit is not eligible. Please provide a statement from the financial institution administering your student loan showing interest paid in the year.

- ☐ ***Disability:*** If you or a dependent is "markedly restricted" in your daily living activities because of mental or physical impairment, please provide a signed form T2201 only if you have not provided the form to the Canada Revenue Agency in a prior year.
- ☐ ***First-time home buyers:*** To qualify for the first-time home buyers' tax credit, you or your spouse or partner must not have owned another home in the current or four preceding calendar years. Please provide us with a copy of the statement of adjustments that you received from your lawyer when you purchased your home.
- ☐ ***Eligible School Supply Tax Credit:*** Credit up to $1000; receipts for expenses paid for personally for classroom use along with a letter from the School stating that supplies were purchased personally and used for school/classroom use.
- ☐ ***Other:*** We have included the most common income and deduction categories, if you have any questions in regards to other potential income or deductions, please discuss your specific situation with us, ie – Northern Resident's deduction, Senior's Home Renovation/Accessibility Credit – Provincial & Federal, Volunteer Fire Fighter/Search & Rescue Credit, Adoption Expenses, disability support expenses, etc.

Section 7: Other

- ☐ ***2019 Personal income tax return and Notice of Assessment/Re-assessment*** Please provide your 2019 Notice of Assessment/Re-assessment received for the 2019 calendar year. Also, please provide a copy of your 2019 personal income tax return if not prepared by Todd Larson & Associates Inc.
- ☐ ***Income tax instalments*** Please provide the latest statement from Canada Revenue Agency showing tax instalments paid for 2020.
- ☐ ***Bank Information*** If not already set up for direct deposit, please provide a cancelled cheque or a document from your bank confirming your bank account number including the bank # (3 digits), the branch # (5 digits) and your account # (up to 12 digits).
- ☐ ***Important Notice: Our office is attempting to go paperless, we will no longer be printing any T1 documentation. We will email you an invite to our Larson Accounting Client Portal where you will be able to access all T1 documentation that we have provided in the past. You will need to follow the instructions in the email to set up the portal. All tax returns will be uploaded individually to client portals using their personal email address, if you do not have a personal email, a form must be completed and signed by all parties authorizing shared access to Client Portal and all T1 documentation. See our receptionist regarding this authorization, if needed.***
- ☐ ***If you do not have an email address, do you want a paper-copy of your return?*** ❑ Yes ❑ No ***We will no longer be printing any T1 documentation unless it is requested.***

<u>Questions:</u>

By signing below, I agree and understand that my income tax return is completed on information I have provided to my accounting firm, Todd Larson & Associates Inc, and if there are errors or omissions due to receipts and information not being provided to them, I am solely responsible for any late fees and penalties resulting from the Canada Revenue Agency's audit of my Personal Income Tax Return. It is not the responsibility of Todd Larson & Associates to gather information on my behalf. Any review of information slips or schedules requested by the Canada Revenue Agency will incur an additional fee that will be charged at the time of the review.

I have read this questionnaire in full, have answered all questions accurately, and have provided all of my information to Todd Larson & Associates Inc and give permission to them to process my 2020 tax return.

Read & Agreed: ____________________ **Date Signed:** ____________________

Read & Agreed, Spouse/Partner: ____________________ **Date Signed:** ____________________

Reminder: All personal income tax return invoices must be paid in full before return will be filed.