2022 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	❑Mr ❑Mrs ❑Ms ❑Miss ❑Other:	❑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? (If yes, attach receipts)
						❑Yes ❑No
						❑Yes ❑No
						❑Yes ❑No
						❑Yes ❑No
						❑Yes ❑No

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 documents listed on Required Documents for Deceased Persons checklist

Bank Information – If your banking information has changed, provide a void cheque or direct deposit form from your bank confirming your new bank details.

Important Notices - CRA will not mail a Notice of Assessment to you if we file your return. You can access it via My Account or request that we retrieve a copy for you. If you are registered for our client portal, we will not print any T1 documentation. All tax returns will be uploaded individually to your portal when ready for review. If you are not registered for our secure portal and would like to set up access, please contact our office.

Returns are processed based on due date (personal only returns due May 1st vs small business returns due June 15th), then on a first-come, first-serve basis once all information is received.

Section 2: Canada Revenue Agency Questions

1. Are you a Canadian citizen? ❑Yes ❑No; is your spouse/partner a Canadian Citizen? ❑Yes ❑No
2. Do you want to be on the voter list?
   ❑Yes ❑No; Spouse/Partner ❑Yes ❑No
3. Did you or your spouse own or hold foreign property with a total cost greater than CAD$100,000 any time during the year?
   This includes funds, patents, copyrights, investments held in foreign currency, real property, etc. If you are not sure whether this applies to you, please contact us with details of your specific situation or consult the CRA website.
   ❑Yes ❑No; if yes, provide details: ____
4. Would you like to receive CRA correspondence via My Account? Any future correspondence from CRA will no be mailed. You must be registered for My Account to access electronic mail.
   ❑Yes ❑No; Spouse/Partner: ❑Yes ❑No
5. Do you or your spouse have a tax free savings account (TFSA)? ❑Yes ❑No; Spouse/Partner ❑Yes ❑No
6. Did you sell your principal residence in 2022?
   ❑Yes ❑No; if yes, provide the statement of adjustments and fill out the Principal Residence Designation form
7. Did you have a change in use for any of your residences in 2022 (where you normally live, rental suite, AirBNB)?
   ❑Yes ❑No, if yes, provide details:
8. Did you or your spouse receive any income under the Indian Act? ❑Yes ❑No; if yes, provide details:

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:

❑ **T4, T4A, T4E, T5007** – Employment income, pension, retirement, annuity & other income, employment insurance, WCB

❑ **T4RSP**, **T4RIF** – RRSP withdrawals

❑ **T3, T5, T5008, T5013** – Investment Income; provide statement(s) of investment income and/or Annual Report(s)

❑ **Disposition of assets** - includes shares, trust units, mutual fund units, bonds, and other real property such as vacation or rental property
Provide documentation showing the purchase date, original cost, date of sale, and proceeds of disposition. For investments, obtain a statement of security dispositions from your investment advisor.

❑ **Rental income** – fill out the Rental Income Form. If you have multiple properties, fill a form out for each property. If you own residential property as a part of a partnership, you are required to file an Underused Housing Tax return due April 30th. Contact our office for more information.

❑ **Business or professional income** – provide all income and expense information and supporting documents.
Did you earn over $30,000 in gross revenue? ❑ Yes ❑ No, if yes, you must be registered for a GST account
Are you a GST registrant? ❑ Yes ❑ No
Do you request that we file your GST? ❑ Yes ❑ No, if yes, please confirm your business #(s):

❑ **Internet business activities –** income earned from web pages or sites including advertising, income programs such as Google AdSense, selling goods or services on auction, marketplace, or similar sites, etc. Provide up to five main web pages or website addresses that you earn income from as well as the amount of revenue

❑ **Spousal support** – provide the amount of payments received during the year

❑ **Other income** – tips, gratuities, commissions, etc. Provide description(s) and amount(s):

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 including any contributions made on or before March 1, 2023.

❑ **Union and Professional Dues –** Provide receipts showing amounts paid during the year. Dues must have been paid personally to be deductible.

❑ **Childcare expenses** – If payments are made out to an individual, provide the name and SIN of the provider. Include receipts for summer camps.

❑ **Spousal support –** Provide the amount of support payments made during the year (attach agreement and any amendments).

❑ **Moving expenses –** Fill out and provide the Claim for Moving Expenses form as well as a letter from your new employer stating you have not been reimbursed for any moving expenses.

- ❑ **Labour Mobility Deduction for Tradespeople –** If you paid temporary relocation expenses in 2022, you may be eligible for this deduction. Provide us with a complete form T777 and supporting documents.
- ❑ **Carrying costs related to investment income –** Provide list of investment counsel fees, interest paid on investment loans, and overdraft interest paid on broker accounts along with supporting documents from the investment broker.
- ❑ **Employment Expenses –** If your employment contract required you to pay expenses that you were not reimbursed or didn't receive an allowance for, you may claim certain expenses. 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 at least 50% of the time for four consecutive weeks, fill out the Home Office Expenses Worksheet (Temporary Flat Rate Method) and provide it to us.
- ❑ **Home-based business expenses –** Fill out and provide a Home Use Expenses for Business form. Receipts must be available in case of audit.
- ❑ **Repayment of COVID-19 Benefits –** If you were required to repay COVID-19 benefits and would like to claim the deduction for repayments in the 2020 or 2021 years instead of 2022, fill out form T1B and provide it to us.

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 prescription drugs, have your pharmacy print a listing of all prescriptions showing the amounts and total paid in 2022. For all other medical expenses, provide all receipts net of insurance reimbursement. Receipts must have the name of patient, amount paid, who the payment was made out to, and a description of the expense.
- ❑ **Medical Travel –** Fill out the Medical Travel Form and provide it to us along with a letter from your doctor stating the reason it was necessary for you to travel out of town for medical services and that a companion was medically necessary (if applicable). Please provide receipts for accommodations, transportation, and parking. We use the simplified method for food and fuel.
- ❑ **Charitable or political donations -** Provide donation slips for the current or prior five years that have not yet been claimed for tax purposes. We require the "Official Receipt for Income Tax Purposes" for all receipts. Foreign donations are not tax deductible.
- ❑ **Tuition and Education –** Provide form T2202A for Canadian institutions or a signed Form TL11A for qualifying foreign institutions.
- ❑ **Interest on student loans –** Provide a statement from the financial institution administering your student loan showing interest paid in the year. The loan must be administered under either the Canada or Provincial Student Loans Program to be eligible.
- ❑ **Disability –** If you or a dependent is markedly restricted in your daily living activities due to a mental or physical impairment, provide a completed Form T2201 only if you have not already provided it to the CRA in a prior year. A medical practitioner must fill out and sign a section of this form.
- ❑ **First-time home buyers –** Provide us with a copy of the statement of adjustments for the purchase of the home. If you or your spouse or partner have owned another home in the current or four preceding calendar years, you do not qualify for this credit.
- ❑ **Eligible School Supply Tax Credit –** Provide receipts for expenses paid for personally for classroom use as well as a letter from the school stating That the supplies were purchased personally and used for school/classroom use.

We have included the most common income and deduction categories. If you have questions regarding other potential income, deductions, or tax credits, please discuss your specific situation with us, ie – Northern Resident's deduction, Senior's Home Renovation/Accessibility Credit, Volunteer Fire Fighter/Search & Rescue Credit, Adoption Expenses, disability support expenses, etc.

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 2022 tax return.

Read & Agreed:____ **Date Signed:**______________________

Read & Agreed, Spouse/Partner:__________________________ **Date Signed:**______________________

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