2023 Personal Income Tax Return Questionnaire
Todd M. Larson Inc.

General Information

☐ Yes ☐ No Did your marital status change in 2023? If so, please fill out the information below
☐ Married ☐ Single ☐ Common-law ☐ Separated ☐ Divorced ☐ Widowed
Date of change: ______________
If separated or divorced, we require a copy of the separation and/or custody agreement(s)

☐ Yes ☐ No Did your address or phone number change? If yes, provide your new information:

☐ Yes ☐ No Would you like to register/change your banking information for CRA direct deposit?
If yes, provide a void cheque or direct deposit form from your bank

☐ Yes ☐ No Did one of the taxpayers become deceased during the year?
If yes, provide the information listed on the Required Documents for Deceased Persons checklist

☐ Yes ☐ No Are you a co-signor on a mortgage with anyone other than a spouse?

☐ Yes ☐ No Are you a co-signor on any bank or investment accounts with a value of $50,000 or more with anyone other than a spouse?

☐ Yes ☐ No Are you a co-signor on a GIC with anyone other than a spouse?

☐ Yes ☐ No Do you have a trust agreement set up for estate planning purposes?

If you answered yes to any of these four questions, please provide names, your relationship to them, address(es), value(s), and trust agreement if applicable.

Canada Revenue Agency Questions

☐ Yes ☐ No Are you a Canadian citizen?
☐ Yes ☐ No Spouse/partner

☐ Yes ☐ No Do you want to be on the voter list?
☐ Yes ☐ No Spouse/partner

☐ Yes ☐ No Did you or your spouse own foreign investments, real estate, or other foreign property costing more than $100,000 during the year?

☐ Yes ☐ No Would you like to receive mail from the CRA electronically via My Account?
☐ Yes ☐ No Spouse/partner

☐ Yes ☐ No Do you/your spouse have a TFSA (Tax Free Savings Account)?
☐ Yes ☐ No Spouse/partner

☐ Yes ☐ No Do you/your spouse have an FHSA (First Home Savings Account)?
☐ Yes ☐ No Spouse/partner

☐ Yes ☐ No Did you sell your principal residence in 2023?
If yes, provide the Statement of Adjustments and fill out the Principal Residence Designation form

☐ Yes ☐ No Did your principal residence change or did you start or stop renting any of your properties?

☐ Yes ☐ No Did you or your spouse receive any income under the Indian Act?
☐ Yes ☐ No Spouse/partner

2023 Personal Income Tax Return Questionnaire
Todd M. Larson Inc.

List all dependents of you and/or your spouse.

Name	Relationship	Birth Date	SIN	Earned Net Income	Tax return to be done? Y/N

Provide details if dependent children are not living with you full time: ____________________________

Check off all items that apply to you/your spouse. Information required and descriptions for each item are available in the Appendix.

Income

☐ T4, T4A, T4E, T5007
☐ T4RSP, T4RIF
☐ T3, T5, T5008, T5013
☐ Self-employment income
☐ Internet business activities
☐ Rental income
☐ Spousal support
☐ Other sources of income

Deductions

☐ RRSP contributions
☐ FHSA contributions
☐ Union and professional dues
☐ Childcare expenses
☐ Spousal support
☐ Moving expenses
☐ Labour Mobility Deduction for Tradespeople
☐ Carrying costs related to investment income
☐ Employment expenses
☐ Home office or home-based business expenses.
☐ Repayment of COVID-19 benefits

Tax Credits

☐ Medical expenses, including medical travel
☐ Charitable or political donations
☐ Tuition & education
☐ Interest on student loans
☐ Disability
☐ First-time home buyers
☐ Eligible School Supply tax credit
☐ BC Renter's Tax Credit

2023 Personal Income Tax Return Questionnaire
Todd M. Larson Inc.

We have included the most common categories on page 2. If you have questions about other potential income, deductions, or tax credits, please let us know. i.e. Northern Residents deduction, home accessibility, volunteer firefighter/search & rescue credit

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 April 30th vs small business returns due June 15th), then on a first-come, first-serve basis once all information is received.

If you have additional notes or questions regarding your tax return, provide them below:

____
____
____

____
____
____

By signing below, I agree and understand that my income tax return is completed on information I have provided to my accounting firm, Todd M. Larson 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 M. Larson Inc. 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 M. Larson Inc and give permission to them to process my 2023 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.

2023 Personal Income Tax Return Questionnaire
Todd M. Larson Inc.

Appendix – Descriptions and Information Required

Income

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)

Self-employment income – provide all income and expense information and supporting documents.

☐ Yes ☐ No Did you earn over $30,000 in gross revenue? If yes, you must be registered for GST
☐ Yes ☐ No Are you a GST registrant?
☐ Yes ☐ No Do you request that we file your GST? 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, income earned outside of Canada, etc. Provide description(s) and amount(s): ____

Deductions

RRSP contributions – Provide receipts for RRSP contributions for the year including any contributions made on or before March 1, 2024.

FHSA Contributions – Provide receipts for contributions to First Home Savings Accounts, can deducted up to $8,000 per year ($40,000 lifetime)

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 2023, 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 for Employees/COVID19–If you were required to work from home due to COVID-19 at least 50% of the time for four consecutive weeks. Provide details and a signed form T2200/ T2200S from your employer.

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, include your T4A issued from the Government of Canada

Tax Credits

Medical Expenses – For prescription drugs, have your pharmacy print a listing of all prescriptions showing the amounts and total paid in 2023. 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 accommodation, 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

Tax Credits, continued

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.

BC Renter's Tax Credit – Individuals and families with an adjusted income of $60,000 or less are eligible to claim a $400 tax credit if you/your family occupied an eligible rental unit under a tenancy agreement, license, or sublease agreement. To claim the credit, the claimant must be a resident of BC, 19 years of age or older, a parent, or cohabitating with a spouse/common law partner on December 31st of the tax year. Roommates may each claim their own renter's tax credit if tall other criteria are met.