



## PERSONAL INCOME TAX QUESTIONNAIRE

PERSONAL INFORMATION			
Full name:	S.I.N.	Birthdate:	Citizenship:
Address			Marital Status:
Phone:	E-mail:		
SPOUSE INFORMATION			
Full name:	S.I.N.	Birthdate:	Citizenship:
Are we preparing your spouses return?      YES <input type="checkbox"/> NO <input type="checkbox"/>			
If not, please provide spouse's net income from line 236 of his/her 2024 return:			
CHILDREN INFORMATION			
Full name (child 1):	S.I.N.	Birthdate:	
Attending Post-Secondary Education?      YES <input type="checkbox"/> NO <input type="checkbox"/> (If YES, please attach T2202A/TL11A)			
Full name (child 2):	S.I.N.	Birthdate:	
Attending Post-Secondary Education?      YES <input type="checkbox"/> NO <input type="checkbox"/> (If YES, please attach T2202A/TL11A)			
Full name (child 3):	S.I.N.	Birthdate:	
Attending Post-Secondary Education?      YES <input type="checkbox"/> NO <input type="checkbox"/> (If YES, please attach T2202A/TL11A)			
Full name (child 4):	S.I.N.	Birthdate:	
Attending Post-Secondary Education?      YES <input type="checkbox"/> NO <input type="checkbox"/> (If YES, please attach T2202A/TL11A)			
INCOME SOURCE CHECKLIST			
<input type="checkbox"/> Employment/Commission or Scholarship income (T4)	<input type="checkbox"/> Estates/Trusts/Mutual Fund (T3)		
<input type="checkbox"/> Professional Association Benefits Received (T4A)	<input type="checkbox"/> Rental Property (complete worksheet)		
<input type="checkbox"/> Pension (T4A/T4OAS/T4AP)	<input type="checkbox"/> Spousal Support Payments Received		
<input type="checkbox"/> Employment Insurance Benefits (T4E)	<input type="checkbox"/> RRSP, DPSP, RPP, RRIF (T4RSP/T4A/T4RIF)		
<input type="checkbox"/> Interest/Dividends/Capital Gains (T5/T5008)	<input type="checkbox"/> Self-employment if not incorporated (complete worksheet)		
<input type="checkbox"/> Limited Partnership (T5013)	<input type="checkbox"/> Other		

DEDUCTIONS / CREDITS CHECKLIST (with official receipts/lists)	
<input type="checkbox"/> RRSP Contributions (Including 1 <sup>st</sup> 60 days of 2025)	<input type="checkbox"/> Adoption Expenses
<input type="checkbox"/> Union/Professional Dues	<input type="checkbox"/> Caregiver Receipt
<input type="checkbox"/> Child Care Expenses (incl. name & SIN of care provider)	<input type="checkbox"/> Disability Amount (T2201)
<input type="checkbox"/> Moving Expenses (complete T1-M worksheet*)	<input type="checkbox"/> Infirm Dependent
<input type="checkbox"/> Spousal Support Payments Made (provide legal agreement)	<input type="checkbox"/> Student Loan Interest Statement
<input type="checkbox"/> Investment loan interest (Non-registered investments only)	<input type="checkbox"/> Tuition Fees (T2202A/TL11A)
<input type="checkbox"/> Investment Counsel Fees (Non-registered investments only)	<input type="checkbox"/> Medical Expenses
<input type="checkbox"/> Legal Fees (provide details)	<input type="checkbox"/> Charitable Donations
<input type="checkbox"/> Employment Expenses (provide signed T2200 and please complete worksheet)	<input type="checkbox"/> Political Contributions
<input type="checkbox"/> First Home Savings Account (TFHSA) Year account was opened: _____	<input type="checkbox"/> Qualifying home accessibility expenses (seniors & persons with disabilities)
<input type="checkbox"/> First-time Home Buyer	<input type="checkbox"/> B.C. Renter's Tax Credit (provide amount paid, address, # months rented, and landlord's name)
<input type="checkbox"/> Digital news subscription	<input type="checkbox"/> Other
OTHER IMPORTANT DOCUMENTS CHECKLIST	
<input type="checkbox"/> Signed T1 Engagement/Representation Letter	<input type="checkbox"/> Other

Did you (or your spouse) dispose of real estate (including your principal residence) or investments during 2023? If so, please provide the following details (and attach sale documents,) or provide realized gains/losses report.					
Description of Property & Quantity	Date Acquired	Date of Disposal	Sales Proceeds	Original Cost (plus improvements)	Costs of Disposal

ELECTIONS CANADA
If you are a Canadian Citizen, do you authorize Canada Revenue Agency to provide information about you in Elections Canada? YES <input type="checkbox"/> NO <input type="checkbox"/>

FOREIGN REPORTING – T1135
Did you (or your spouse) own or hold foreign assets (e.g. real estate, foreign stocks/bonds, etc.) with a total aggregate cost in excess of CDN \$100,000 at any time during the year? If so, please provide a complete list. YES <input type="checkbox"/> NO <input type="checkbox"/>

**IMPORTANT NOTE:** Starting in 2016, the sale of a principal residence must now be reported along with a principal residence designation. Penalties will apply for non-reporting.

\*T1-M worksheet can be downloaded from the Canada Revenue Agency website: [www.cra-arc.gc.ca/forms](http://www.cra-arc.gc.ca/forms)