

Gallagher & Mannisto

Chartered Professional Accountants, Chartered Accountants
459 King Street East, Toronto, Ontario, M5A, 1L6, PH#:416-360-1010

2017 Personal Income Tax Questionnaire

This questionnaire is designed to assist you in compiling the information necessary to prepare your 2017 tax return. Please attach this form to your documentation.

Client Name: _____

Date of Birth: _____ S.I.N.: _____

Telephone: (____) _____ Fax: (____) _____ Email: _____

Please indicate address only if changed since 2016 income tax return:

Marital status (if changed in 2017, indicate change and date) _____

New family members:

Name: _____

Date of birth: _____

Date of adoption: _____

Sale of principal residence: If you have sold your principal residence during 2017, provide copies of all documents concerning the sale. _____

Please check items attached:

Note: Ensure all information slips are provided with your return. Canada Revenue Agency's process of matching information slips to tax return is very accurate. In certain circumstances, unreported income can be penalized up to 20% of the unreported amounts.

- ☐ Details of foreign property, other than personal-use property, if aggregate cost at any time during the year is in excess of \$100,000, as well as any investment in "foreign affiliates" _____

Gallagher & Mannisto

Chartered Professional Accountants, Chartered Accountants
459 King Street East, Toronto, Ontario, M5A, 1L6, PH#:416-360-1010

Income

- ☐ Employment – T4
 - ☐ Old Age Security – T4A(OAS)
 - ☐ Canada Pension Plan benefits – T4A(P)
 - ☐ Retirement Income – T4A for pensions, T4RSP, T4RIF
(Attach details of spouse's income to determine if pension splitting is beneficial)
 - ☐ Employment Insurance – T4E
 - ☐ Interest, Dividends and other Investment Income – T5/T600
 - ☐ Mutual Funds and other Trust Income – T3
 - ☐ Limited Partnership – T5013
 - ☐ Partnership or joint venture income
 - ☐ Business or Professional – Financial Statements or T5013
 - ☐ Income from a profit-sharing plan
 - ☐ Income from Social Assistance
 - ☐ Rental Property (attach details of income, expenses, purchases and sales)
-
- ☐ If assets have been purchased for use in the business, or loans incurred for business purposes, provide appropriate documents _____
 - ☐ Capital Gains/Losses _____
 - ☐ 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) _____
 - ☐ Separation allowances or child maintenance
 - ☐ Pension income from foreign sources
 - ☐ Other Income (e.g., stock options, annuities, scholarships, bursaries, research grants, RRSPs/RIFS – attach T4RSP, Workers' Compensation benefits)
-

Gallagher & Mannisto

Chartered Professional Accountants, Chartered Accountants
459 King Street East, Toronto, Ontario, M5A, 1L6, PH#:416-360-1010

Deductions

- ☐ Registered Retirement Savings Plan contributions (attach receipts)
Attach T10 – Personal Adjustment Reversal, if you received one.) _____
- ☐ Annual union, professional dues (attach receipts) _____
- ☐ 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

- ☐ Child care expense (attach receipts):
 - ☐ For individual child care providers, include S.I.N. and address

 - ☐ For summer camps, indicate number of weeks in-residence _____
- ☐ 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)

- ☐ Commission and employment expenses (include details and T2200 or TL2)
- ☐ Carrying charges (interest on money borrowed to earn investment income, investment counsel fees, interest for limited partnership) _____
- ☐ Other deductions and expenses (attach receipts) _____
- ☐ Federal and provincial political contributions (attach receipts) _____
- ☐ Charitable donations (attach receipts) (provide details of gifts in kind, eg., securities)

- ☐ Medical expenses (attach receipts) and details of private health insurance premiums, including amounts paid while traveling _____
- ☐ Disability deduction for you or dependant (if first-time claim, attach T2201 signed by physician) _____
- ☐ Adoption expenses _____

Gallagher & Mannisto

Chartered Professional Accountants, Chartered Accountants

459 King Street East, Toronto, Ontario, M5A, 1L6, PH#:416-360-1010

- ☐ Tuition fees (attach T2202/T2202A including amounts that can be transferred from dependent)
- ☐ Details of public transit passes (Only include details up to June 30th 2017 & include passes for your spouse and children under 19)
- ☐ Labour-sponsored funds – T5006
- ☐ Expenses qualifying for investment tax credits (e.g., film and video productions, resource expenditures re: mining or oil and gas)
- ☐ Interest paid on student loans (attach reporting slip) _____
- ☐ If you are a teacher or early childhood educator, provide a summary of eligible supplies to a maximum of \$1,000 in the calendar year. _____

For wholly dependent persons, please attach list and indicate for each dependant:

Name: _____

Address if different: _____

Relationship: _____

Birth date: _____

S.I.N.: _____

Net income: _____

Infirmary, if any: _____

Other

- ☐ 2017 instalments (attach February 2017 notice). Total remitted: \$ _____
- ☐ Attach copy of 2016 assessment notices and other correspondence from the CRA
- ☐ Amount of any contributions to or distributions from, or loans to or from foreign trusts in 2017 _____
- ☐ Indicate whether you wish to split pension income with spouse to reduce combined income tax:
 - Yes: _____
 - No: _____
- ☐ Indicate whether you are a U.S. citizen or Green Card holder:
 - Yes: _____
 - No: _____