



# 2021 Tax Questionnaire

1. Please provide the following **personal information**:

First and last name:		SIN:	
Address:		Gender:	
City, Province, Postal Code:		Phone #:	
Email address:		Date of birth: (yyyy/mm/dd)	

2. At December 31 of the current tax year, what was your **marital status**?

Visit this link for the CRA definitions for marital status: <https://www.canada.ca/en/revenue-agency/services/tax/individuals/topics/about-your-tax-return/tax-return/completing-a-tax-return/personal-address-information/marital-status.html>

<input type="checkbox"/>	Single	<input type="checkbox"/>	Married	<input type="checkbox"/>	Divorced
<input type="checkbox"/>	Common law	<input type="checkbox"/>	Separated	<input type="checkbox"/>	Widowed

If your marital status changed during the tax year, please provide the change the date took place:

\_\_\_\_\_

Spouse's full legal name: \_\_\_\_\_

If you are married or common law and we are **not** preparing your spouse's tax return, please provide the following information about your **spouse**:

Date of birth: (yyyy/mm/dd)		SIN:	
Taxable income for the current tax year:		Gender:	

3. Please provide the following information about your **dependent(s)**, if applicable:

First name:				
Last name:				
Relationship:				
SIN: (if applicable)				
Date of birth: (yyyy/mm/dd)				
Total childcare cost: (if applicable)				
Dependent's income: (if applicable)				

4. Please indicate which of the following **tax slips** you are including:

- T4 slips: T4, T4A (including for COVID benefits) T4A(OAS), T4E, T4RSP, T4RIF
- T5 slips: T5, T5007, T5008, T5013
- T3 slips
- RRSP contribution slips
- T2202A tuition/education receipt

5. Please indicate if you are including receipts for any of the following **deductions and credits**:

Receipts for deductions, such as:

- Medical expenses
- Professional or union dues
- Charitable donations
- Political contributions
- Interest paid on student loans
- Childcare expenses
- Moving expenses
- Adoption expenses
- Spousal support payments

6. Did you **work from home** in 2021 due to COVID-19? (Select one answer only.)

Visit this link to see if you qualify to claim expenses for working from home in 2021, what types of expenses can be claimed, and your options for how to claim them: <https://www.canada.ca/en/revenue-agency/services/tax/individuals/topics/about-your-tax-return/tax-return/completing-a-tax-return/deductions-credits-expenses/line-22900-other-employment-expenses/work-space-home-expenses.html>

No, I did not work from home in 2021.

Yes. I will be using the temporary Flat Rate Method to claim expenses for which my employer has not reimbursed me. (Complete section below for claim amount.)

\_\_\_\_\_ # of days you worked from home within the period (maximum 250)

X **\$2.00** Temporary flat rate amount

= \_\_\_\_\_ Amount of your claim (to a maximum of \$500)

Yes. I will be using the Detailed Method to claim expenses for which my employer has not reimbursed me.

I have included receipts for items my employer has not reimbursed me for, as well as a completed T2200 or T2200S signed by my employer. (Digital signatures are acceptable for either form.)

\_\_\_\_\_ total size of your work space (sq ft)

÷ \_\_\_\_\_ total size of all finished areas in your home, including your work space (sq ft)

= \_\_\_\_\_ % of home being used as work space

7. If available, please include the following **additional information**:

- Prior year information (2020 tax return, 2020 Notice of Assessment and/or other CRA correspondence)
- Disability tax credit certificate
- Business income and expenses
- Home office expenses (non-COVID related)
- Rental property income and expenses
- Fishing/farming income and expenses
- Rent or property tax paid in 2021