



Tax Questionnaire

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

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

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

For definitions of "common law" and "separated", visit: <http://www.cra-arc.gc.ca/tx/ndvds/tpcs/ncm-tx/rtrm/cmpltng/prsnl-nf/mrtl-eng.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:

<input type="checkbox"/>	T4 slips: T4, T4A (including for COVID benefits) T4A(OAS), T4E, T4RSP, T4RIF
<input type="checkbox"/>	T5 slips: T5, T5007, T5008, T5013
<input type="checkbox"/>	T3 slips
<input type="checkbox"/>	RRSP contribution slips
<input type="checkbox"/>	T2202A tuition/education receipt

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

<input type="checkbox"/>	Receipts for deductions, such as:									
<input type="checkbox"/>	<table border="0"><tr><td>• Medical expenses</td><td>• Political contributions</td><td>• Moving expenses</td></tr><tr><td>• Professional or union dues</td><td>• Interest paid on student loans</td><td>• Adoption expenses</td></tr><tr><td>• Charitable donations</td><td>• Childcare expenses</td><td>• Spousal support payments</td></tr></table>	• Medical expenses	• Political contributions	• Moving expenses	• Professional or union dues	• Interest paid on student loans	• Adoption expenses	• Charitable donations	• Childcare expenses	• Spousal support payments
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• Professional or union dues	• Interest paid on student loans	• Adoption expenses								
• Charitable donations	• Childcare expenses	• Spousal support payments								

6. Did you **work from home** in 2020 due to COVID-19? (Select one answer only.)

Please visit the website below to see if you qualify to claim expenses for working from home in 2020, 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-229-other-employment-expenses/work-space-home-expenses.html>

<input type="checkbox"/>	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.)
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	_____ # of days you worked from home within the period (maximum 200)
X	<u>\$2.00</u> Temporary flat rate amount
=	_____ Amount of your claim (to a maximum of \$400)

<input type="checkbox"/>	Yes. I will be using the Detailed Method to claim expenses for which my employer has not reimbursed me. <i>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.)</i>
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	_____ 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**:

<input type="checkbox"/>	Prior year information (2019 tax return, 2019 Notice of Assessment and/or other CRA correspondence)		
<input type="checkbox"/>	Disability tax credit certificate	<input type="checkbox"/>	Rental property income and expenses
<input type="checkbox"/>	Business income and expenses	<input type="checkbox"/>	Fishing/farming income and expenses
<input type="checkbox"/>	Home office expenses (non-COVID related)	<input type="checkbox"/>	Rent or property tax paid in 2020