2020 PERSONAL INCOME TAX QUESTIONNAIRE

Client Name(s): _____

Telephone: _____ Email Address to send return: _____

Address (only if changed since 2019 income tax return): _____

_____

Marital status *(if changed in 2020, indicate change and date)*: _____

Please note that if you lived continuously with another person in a conjugal relationship for more than 12 months or had a child with someone, CRA considers you to have a common-law partner.

New family members, if any:

Name of new family member: _____

By birth ☐ or adoption ☐ Date of birth or adoption: _____

Did you sell your home or cottage in 2020? Yes ☐ No ☐
(If Yes, please provide details)

Sale Price: $ _____ Address: _____

Year of acquisition: _____

Please check the items attached:

INCOME

- ☐ Employment – T4
- ☐ Retirement Income – T4A(OAS), T4A(P), T4A for pensions, T4RSP, T4RIF
- ☐ Employment Insurance – T4E
- ☐ Interest, Dividends and other Investment Income – T3/T5/T600
- ☐ Business or Professional – include profit and loss statement, financial statements or T5013
- ☐ Rental Property (attach details of income, expenses, purchases and sales)
- ☐ Capital Gains/Losses (attach capital gains and loss schedule)
- ☐ Did you dispose of any capital properties this year? (attach copies of sales detail and original purchase documentation.)
- ☐ Alimony $_____
- ☐ Other Income (e.g., stock options, annuities, scholarships, bursaries, research grants, RRSPs – attach T4RSP, Workers' Compensation benefits).

DEDUCTIONS

- ☐ I worked primarily from home for at least four consecutive weeks in 2020 due to COVID-19 and would like to use the simplified method to claim a home office deduction. My employer has provided me with a T2200S or T2200. Working days home office used in 2020 (typically weekdays only): _____
- ☐ RRSP (Registered Retirement Savings Plan) contributions (attach receipts)
- ☐ Annual union, professional dues (attach receipts)
- ☐ Child care expense (attach receipts): For individual providers, include SIN: _____
  For summer camps, indicate number of weeks: _____

- [ ] Moving expenses (attach receipts). Indicate distance moved to new employment (**must be greater than 40 km**)
- [ ] Carrying charges (interest on money borrowed to earn investment income, investment counsel fees, interest for limited partnerships)
- [ ] Federal and provincial political contributions (attach receipts)
- [ ] Charitable donations (attach receipts) (provide details of gifts in kind, e.g., securities)
- [ ] Medical expenses and health insurance premiums, including travel (must be greater than 3% of your income to max of $2,352)
- [ ] Disability deduction for you or dependant (if first-time claim, attach T2201 signed by physician)
- [ ] Adoption expenses (attach receipts)
- [ ] Tuition fees (attach T2202/T2202A including amounts that can be transferred from dependants)
- [ ] Interest paid on student loans (attach reporting slip)
- [ ] Did you purchased your first home in 2020 to receive Home Buyer's Tax Credit:
- [ ] If you are claiming auto or home office, indicate business use %: Auto_____% Office_____ %
- [ ] If you are a teacher, indicate amounts spent on school supplies in the year: $_____
- [ ] Did you pay rent in Manitoba in 2020 and are you claiming it? If so please indicate total paid $_____
  (only one claim per dwelling can be made)
- [ ] **Do you own non-Canadian property (e.g., real estate, US stocks) costing more than CAD$100,000?**
  (If yes, provide details as you must file a T1135)

ADDITIONAL INFORMATION OR COMMENTS:

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