



LISE DELEURME

COMPTABLE PROFESSIONNELLE AGRÉÉE INC.
CHARTERED PROFESSIONAL ACCOUNTANT INC.

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2017 PERSONAL INCOME TAX QUESTIONNAIRE

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

PERSONAL INFORMATION			
		SIN	Date of Birth
Name:			
Name of Spouse:			
Dependents:	1.		
	2.		
	3.		
	4.		
	5.		
Address:		Telephone:	
Town:		Email:	
Province:			
Postal Code:			
Is this a new address (yes / no)	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Change in Martial Status	Changed to:	Date:	
Void cheque provided	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
How do you want your return?	<input type="checkbox"/> Printed	<input type="checkbox"/> Emailed	

Please provide your previous years Notice of Assessment (NOA)

INCOME (Check the items applicable to you)

- Employment (T4)
- Self-Employed (list expenses/revenue)
 - GST returns
 - Are we preparing? YES / NO
- Old Age Security (OAS)
- Canada Pension Plan (CPP)
- Pension, Retirement, Annuity, and other income (T4A, T4RSP, T4RIF)
- Employment Insurance (T4E)
- Investment Income (T5/T600)
- Investment Statements (withdrawal of funds)
- Mutual Funds (T3)
- Limited Partnership (T5013)
- Rental Property (Income, Expenses, Purchases, Sales)
- Did you dispose of Capital Property? (copies of sale agreement)
- Spousal Support (attach agreement)
- Other Income (stocks, annuities, scholarships, RRSP, WCB)

DEDUCTIONS (Check the items applicable to you)

- Home Accessibility Tax Credit (e.g. wheel chair ramp, grab bars, etc.)
- RRSP contributions
- Annual union dues
- Child care expenses
- Allowable business investment losses
- Moving expenses
- Alimony
- Commission and employment Expense
- Carrying Charges (investment counsel fees, interest)
- Other deductions/expenses
- Federal/Provincial political contributions
- Donations
- Medical expenses and private health insurance premiums
- Disability deduction for you or dependent
- Child fitness and arts tax credit
- Disability Tax Credit
- Caregiver claim
- Adoption expense
- Tuition fees (T2202)
- Labour sponsored funds (T5006)
- Interest paid on student loans
- Rent or property tax
- First time home buyer
- Repayment of home buyers plan
- Volunteer fire fighter

OTHER (Check the items applicable to you)

- Installments
 - Remitted: \$ _____
- Foreign property information
- Sale of principle residence

Comments:
