

Income Tax Questionnaire and Checklist

Tax Year

Personal Information

	You	Your Spouse
First Name		
Middle Initial (optional)		
Last Name		
Social Insurance Number		
Date of Birth (month/day/year)		
Current Address		
Mailing Address, if different from above		
Phone Number		

Citizenship and Province of Residency

- Are you a Canadian Citizen?
 - ☐ Yes.
 - ☐ No.
- What province/territory did you live in on December 31? _____
- Did you live in another province/territory during the year?
 - ☐ Yes.
 - Which province/territory? _____
 - Date of your move to the province/territory noted above: _____
 - ☐ No.

Marital Status and Dependents

- What was your marital status on December 31? _____
 - If you selected married or common-law, please provide your spouse's income (line 23600 of their income tax return **or** a reasonable estimate; used to determine benefit and tax credit eligibility): \$ _____
 - Click "Yes" if your spouse is a post-secondary student: ☐ Yes
 - Click "Yes" if your spouse is disabled: ☐ Yes
- If your marital status changed at any time during the year, on what date did it change?

- Click [here](#) to enter dependent information, if applicable.

Sale of a Principal Residence

Click [here](#) to enter information on the sale of your principal residence, if applicable.

Income

Did you receive any income from the categories below?

If yes, click the income types that apply to you to complete the worksheet, and to find out what information we require, if any. Skip any income types that don't apply to you.

From the worksheet, click “Return to Questionnaire” to be taken back to this form.

For income type explanations, **and to download CRA forms**, visit the [Canada Revenue Agency's website](#).

1. [Income from employment or self-employment.](#)
2. [Employment insurance \(EI\).](#)
3. [CPP, OAS, and/or other pension income.](#)
4. [Income from investments or rental property.](#)
5. [Income from an RRSP.](#)
6. [Spousal or child support payments received.](#)
7. [Income from foreign sources and foreign property ownership.](#)
8. [Other income not listed above.](#)

Expenses and Deductions

Did you incur any expenses listed below?

If yes, click the expenses that apply to you to complete the worksheet, and to find out what information we require, if any. Skip any expense types that don't apply to you.

From the worksheet, click “Return to Questionnaire” to be taken back to this form.

For expense and deduction explanations, **and to download CRA forms**, visit the [Canada Revenue Agency's website](#).

1. [Expenses related to childcare, child support/alimony, or adoption.](#)
2. [Medical expenses and Disability Tax Credit.](#)
3. [Contributions to an RRSP.](#)
4. [Union or professional dues.](#)
5. [Moving expenses.](#)
6. [Tuition fees.](#)
7. [Donations to a registered charity or political party.](#)
8. [Northern Residents Deduction.](#)
9. [Other expenses not listed above.](#)

Employment Expenses

Click [here](#) if you incurred expenses related to employment.

Ontario Residents: Trillium Benefit and Senior Homeowners' Property Tax Grant

Click [here](#) to claim the Ontario Trillium Benefit and the Ontario Senior Homeowners' Property Tax Grant.

Acknowledgement

I acknowledge that the above is my tax information for the complete year, as witnessed by my initials and/or my signature. I understand that my tax return will be prepared without audit based on the information provided in this tax questionnaire.

Print Name	
Signature (type or insert signature image)	
Date	

Worksheet

Dependents

Name	Relationship	Living with You	Post-Secondary Student	Receiving Canada Child Benefit (CCB) for This Person	Their Date of Birth	Net Income (line 23600 of their income tax return), if any
		<input type="checkbox"/> Yes or <input type="checkbox"/> No	<input type="checkbox"/> Yes or <input type="checkbox"/> No	<input type="checkbox"/> Yes or <input type="checkbox"/> No		
		<input type="checkbox"/> Yes or <input type="checkbox"/> No	<input type="checkbox"/> Yes or <input type="checkbox"/> No	<input type="checkbox"/> Yes or <input type="checkbox"/> No		
		<input type="checkbox"/> Yes or <input type="checkbox"/> No	<input type="checkbox"/> Yes or <input type="checkbox"/> No	<input type="checkbox"/> Yes or <input type="checkbox"/> No		
		<input type="checkbox"/> Yes or <input type="checkbox"/> No	<input type="checkbox"/> Yes or <input type="checkbox"/> No	<input type="checkbox"/> Yes or <input type="checkbox"/> No		
		<input type="checkbox"/> Yes or <input type="checkbox"/> No	<input type="checkbox"/> Yes or <input type="checkbox"/> No	<input type="checkbox"/> Yes or <input type="checkbox"/> No		

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Sale of a Principal Residence

Date of sale	
Address of the property you sold	
Year of acquisition of property	
Proceeds from sale (\$)	
Your ownership share (%)	
Number of years as principal residence	

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Income from employment or self-employment

Check if Applicable	Income	Required T-Slips, Worksheets, Forms, or Other Documents to be Submitted with Questionnaire
<input type="checkbox"/>	Income from employment	T4 issued by each of your employers, if received.
<input type="checkbox"/>	Income from self-employment	Please complete a Statement of Business Income and Expenses form, or remit a completed T2125 Statement of Business or Professional Activities form. For “gig” employment (Uber, Skip the Dishes, etc.), please provide an income summary.

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Employment insurance (EI)

Check if Applicable	Income	Required T-Slips, Worksheets, Forms, or Other Documents to be Submitted with Questionnaire
<input type="checkbox"/>	Employment Insurance (EI) received	T4E, if received.

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CPP, OAS, and/or other pension income

Check if Applicable	Income	Required T-Slips, Worksheets, Forms, or Other Documents to be Submitted with Questionnaire
<input type="checkbox"/>	CPP income	T4A(P)
<input type="checkbox"/>	OAS income	T4A(OAS)
<input type="checkbox"/>	Other pension income	T4A, T4RIF, or any other t-slip indicating pension or other retirement income received, if available.

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Income from investments or rental property

Check if Applicable	Income	Required T-Slips, Worksheets, Forms, or Other Documents to be Submitted with Questionnaire
<input type="checkbox"/>	Income from investments	Please provide any T3 or T5 received, or any investment account statement available. Including, but not limited to, dividends, interest, capital gains, or capital losses.
<input type="checkbox"/>	Income from a rental property	Please complete a T776 Statement of Real Estate Rentals form and an Airbnb Annual Income Statement, if applicable.

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Income from an RRSP

Check if Applicable	Income	Required T-Slips, Worksheets, Forms, or Other Documents to be Submitted with Questionnaire
<input type="checkbox"/>	Income from an RRSP	T4RSP, if received.

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Spousal or child support payments received

Please complete the following and provide a copy of the Court Order or Legal Agreement:

Check if Applicable	Type	Amount Received
<input type="checkbox"/>	Child Support	
<input type="checkbox"/>	Spousal Support	

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Income from foreign sources and foreign property ownership

Please provide

Country	
Total amount received (CAD)	

Did you own or hold specified foreign property where the total cost of all such property, at any point in the tax year, was more than \$100,000 CAD?

- ☐ Yes. Please complete and remit form T1135.
☐ No.

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Other income not listed above

Please provide any receipts and attach a description on a separate sheet. Other income can include provincial seniors' benefits, income support normally reported on a T5007 slip, tips/gratuities, income received from cash jobs, other income normally reported in box 28 of a T4A slip, etc.

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Expenses related to childcare, child support/alimony, or adoption

Check if Applicable	Deductions	Required Worksheets, Forms, or Other Documents to be Submitted with Questionnaire
<input type="checkbox"/>	Do you have any expenses related to childcare?	Daycare or day home receipts. If an individual is providing the caregiving, receipts must include their name, address, and Social Insurance Number, or the deduction cannot be claimed.
<input type="checkbox"/>	Do you have any adoption expenses?	Amount: \$ _____

Expenses related to child support or alimony

A copy of the Court Order, Judgment, or written agreement, along with any subsequent revisions, is required. As well, please provide the following:

Total child support paid	
Total alimony paid	

I am up to date with all child support payments: ☐ Yes or ☐ No. If no, please provide:

Amount in arrears	
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Medical expenses and Disability Tax Credit

Check if Applicable	Deductions	Required Worksheets, Forms, or Other Documents to be Submitted with Questionnaire
<input type="checkbox"/>	Do you have any medical expenses ?	Amount: \$ _____
<input type="checkbox"/>	Do you have any expenses related to attendant care ?	Amount: \$ _____
<input type="checkbox"/>	Are you eligible to claim the Disability Tax Credit?	Please provide an approved T2201

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Contributions to an RRSP

Check if Applicable	Deductions	Required Worksheets, Forms, or Other Documents to be Submitted with Questionnaire
<input type="checkbox"/>	Did you contribute to an RRSP?	Contribution slips

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Union or professional dues

Check if Applicable	Deductions	Required Worksheets, Forms, or Other Documents to be Submitted with Questionnaire
<input type="checkbox"/>	Did you pay union or professional dues not reported on a T4?	Receipts

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Moving expenses

Check if Applicable	Deductions	Required Worksheets, Forms, or Other Documents to be Submitted with Questionnaire
<input type="checkbox"/>	Did you move to a new home to work or to be a full-time student in a post-secondary program at a university, college; and your new home is at least 40 kilometres closer to your new work location or school? If yes, you may be able to claim moving expenses.	Please complete and remit a T1-M Moving Expenses Deduction form.

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Tuition fees

Check if Applicable	Deductions	Required Worksheets, Forms, or Other Documents to be Submitted with Questionnaire
<input type="checkbox"/>	Did you pay tuition fees?	T2202 or receipts/proof of payment

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Donations to a registered charity or political party

Check if Applicable	Deductions	Required Worksheets, Forms, or Other Documents to be Submitted with Questionnaire
<input type="checkbox"/>	Did you make any contributions to federal or provincial political parties?	Amount: \$ _____
<input type="checkbox"/>	Did you make any charitable donations?	Amount: \$ _____

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Northern Residents Deduction

If you live in a [prescribed northern zone](#) (Zone A) or [prescribed intermediate zone](#) (Zone B), please provide the following:

Address (must be located in Zone A or Zone B)	
Began living at this address on	
Left this address on (leave blank if this is your current address)	

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Other expenses not listed above

Check if Applicable	Deductions	Required Worksheets, Forms, or Other Documents to be Submitted with Questionnaire
<input type="checkbox"/>	Other deductions not listed above?	Please provide any slips or receipts and attach a description on a separate sheet.

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Expenses related to employment

Check if Applicable	Expenses	Required Worksheets, Forms, or Other Documents to be Submitted with Questionnaire
<input type="checkbox"/>	Were you required to incur employment expenses (auto expenses, expenses to earn a commission, etc.) for which you were not reimbursed by your employer? If yes, please provide Form T2200 completed by your employer, and complete and remit Form T777 Statement of Employment Expenses.	T2200 and T777
<input type="checkbox"/>	Were you employed as a long-haul truck driver and away from your home terminal for more than 24 consecutive hours? If yes, you may be able to claim a deduction for expenses related to meals and lodging.	Please provide Form TL2 completed by your employer. Please make sure all trip information is completed as well.
<input type="checkbox"/>	Did you incur any expenses for supplies while employed as a teacher or early childhood educator? A list of eligible supplies can be found here .	Amount: \$ _____
<input type="checkbox"/>	Other employment expenses not listed above?	Please provide any receipts and attach a description on a separate sheet.

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Claim the Ontario Trillium Benefit and Ontario Senior Homeowners' Property Tax Grant

Check if Applicable	Required Worksheets, Forms, or Other Documents to be Submitted with Questionnaire
<input type="checkbox"/>	Please complete and submit form 5006-TG ON-BEN . Please note only one family member may claim this benefit.

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