Bromwich + Smith

Prior-Year Income Tax Return Questionnaire

For the Full Tax Year 2025

Instructions

Step 1: Answer the questions that apply to you only. **This questionnaire may look long, but don't worry, many sections may not fit your situation. Just complete the parts that do. If something does not apply, it's okay to skip it!**

Step 2: When you're finished, save a copy of the questionnaire to your computer and upload it to your Supportal account. In addition, please upload any supporting documents or forms requested for the questions you answered.

Section 1: 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		

Province of Residency

1. What province/territory did you live in on December 31? _____
2. Did you live in another province/territory?
    a. ☐ Yes.
        i. Which province/territory? _____
        ii. Date of your move to the province/territory noted above: _____
    b. ☐ No.

Marital Status

1. What was your marital status on December 31? _____
    a. If you selected married or common-law, please provide your spouse's income (line 23600 of their tax return or a reasonable estimate). Enter 0 for none. This is used to determine benefit and tax credit eligibility: $ _____
    b. Click "Yes" if your spouse is a post-secondary student: ☐ Yes
    c. Click "Yes" if your spouse is disabled: ☐ Yes
2. If your marital status changed at any time during the year, on what date did it change? _____

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Dependants

If you have dependants, please add their information below. If a dependant had income, enter their net income in the final column.

Name	Relationship	Living with You	Post-Secondary Student	Receiving Canada Child Benefit (CCB) for This Person	Their Date of Birth	Their Net Income, if any
		☐ Yes or ☐ No	☐ Yes or ☐ No	☐ Yes or ☐ No		
		☐ Yes or ☐ No	☐ Yes or ☐ No	☐ Yes or ☐ No		
		☐ Yes or ☐ No	☐ Yes or ☐ No	☐ Yes or ☐ No		
		☐ Yes or ☐ No	☐ Yes or ☐ No	☐ Yes or ☐ No		
		☐ Yes or ☐ No	☐ Yes or ☐ No	☐ Yes or ☐ No		

Principal Residence

1. Did you sell your principal residence during the year?
    a. ☐ Yes
    b. ☐ No
2. If **yes**, please fill in the details below. If no, you can skip this section.
    a. Address of the property you sold: _____
    b. Year of acquisition: _____
    c. Proceeds from sale: $ _____
    d. Your ownership share (%): _____
    e. Number of years as principal residence: _____

Section 2: Income

Did you receive income from any of the categories below?

If **yes**, check only the income types that apply to you and provide the details or documents requested for those items. **You can skip anything that does not apply.**

For explanations, **and to download forms**, visit the Canada Revenue Agency's website.

Income from Employment or Self-employment

Check if Applicable	Income	Required Items to be Submitted with Questionnaire
☐	Income from employment (for which you are typically issued a T4)	T4 issued by each of your employers, if received.

☐	Income from self-employment	Please complete and remit: - Statement of Business Income and Expenses, available here, or attach a completed T2125 Statement of Business or Professional Activities form to this questionnaire. For "gig" employment (Uber, Skip the Dishes, etc.), please provide an income summary.

Employment Insurance (EI)

Check if Applicable	Income	Required Items to be Submitted with Questionnaire
☐	Employment Insurance (EI) received	T4E, if received.

CPP, OAS, and/or Other Pension Income

Check if Applicable	Income	Required Items to be Submitted with Questionnaire
☐	CPP income	T4A(P)
☐	OAS income	T4A(OAS)
☐	Other pension income	T4A, T4RIF, or any other t-slip indicating pension or other retirement income received, if available.

Income from Investments or Rental Property

Check if Applicable	Income	Required Items to be Submitted with Questionnaire
☐	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.
☐	Income from a rental property	Please complete and remit: - T776 Statement of Real Estate Rentals form. - Airbnb Annual Income Statement, if applicable.

Income from an RRSP

Check if Applicable	Income	Required Items to be Submitted with Questionnaire
☐	Income from an RRSP	T4RSP, if received, or provide a bank statement as proof of withdrawals.

Spousal or Child Support Payments Received. If you received spousal or child support payments, please complete the following for amounts received for the year, **and provide a copy of the Court Order or Legal Agreement**:

Check if Applicable	Type	Amount Received	Required Items to be Submitted with Questionnaire
☐	Child Support	$	Copy of the Court Order or Legal Agreement
☐	Spousal Support	$	Copy of the Court Order or Legal Agreement

Income from Foreign Sources and Foreign Property Ownership. If you received pension income from a foreign country, please provide the details below:

Country	Total Amount Received
	$
	$

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 Foreign Income Verification Statement.
☐ No.

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.

Section 3: Expenses and Deductions

Did you have any of the expenses listed below?

If **yes**, check only the expense types that apply to you and provide the details or documents requested for those items. **You can skip anything that does not apply.**

For explanations, **and to download forms**, visit the Canada Revenue Agency's website.

Expenses Related to Childcare, Child Support/Alimony, or Adoption

Check if Applicable	Deductions	Amount to Claim	Required Items to be Submitted with Questionnaire
☐	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.
☐	Do you have any expenses related to child support or alimony?	Total child support paid: $ _____ Total alimony paid: $ _____	A copy of the Court Order, Judgment, or written agreement, along with any subsequent revisions, is required. I am up to date with all child support payments: - ☐ Yes - ☐ No. Amount in arrears: $ _____
☐	Do you have any expenses related to adoption?	$	Hang on to your receipts in case the CRA asks for them.

Medical Expenses and the Disability Tax Credit

Check if Applicable	Deductions	Amount to Claim	Required Items to be Submitted with Questionnaire
☐	Do you have any medical expenses?	$	Hang on to your receipts in case the CRA asks for them.
☐	Do you have any expenses related to attendant care?	$	Hang on to your receipts in case the CRA asks for them.
☐	Are you eligible to claim the Disability Tax Credit?	We will claim the disability amount allowed for the tax year.	Please provide an approved T2201 Disability Tax Credit Certificate.

Moving Expenses

Check if Applicable	Deductions	Required Items to be Submitted with Questionnaire
☐	Did you move to a new home to work or to be a full-time student in a post-secondary program at a university or 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 attach a T1-M Moving Expenses Deduction form, or attach receipts and provide the following: - Date of move: _____ - Former address: _____ - New address: _____ Employer/school information. Fill out applicable information: - Former employer's address: _____ - New employer's address: _____ - Name of the school you are attending: _____

Northern Residents Deduction

Check if Applicable	Deductions	Required Items to be Submitted with Questionnaire
☐	Did you live in a prescribed northern zone (Zone A) or prescribed intermediate zone (Zone B) in the tax year? If "Yes", you may be able to claim a Northern resident deduction.	Please provide the following: Address: _____ (must be located in Zone A or Zone B) Dates living at this address (month/day/year): - From: _____ - To: _____ (leave blank if this is your current address).

Tuition fees

Check if Applicable	Deductions	Required Items to be Submitted with Questionnaire
☐	Did you pay tuition fees?	T2202 Tuition and Enrolment Certificate or receipts/proof of payment

Contributions to an RRSP

Check if Applicable	Deductions	Required Items to be Submitted with Questionnaire
☐	Did you contribute to an RRSP?	Contribution slips or receipts

Union or Professional Dues

Check if Applicable	Deductions	Amount to Claim	Required Items to be Submitted with Questionnaire
☐	Did you pay union or professional dues not reported on a T4?	$	Hang on to your receipts in case the CRA asks for them.

Donations to a Registered Charity or Political Party

Check if Applicable	Deductions	Amount to Claim	Required Items to be Submitted with Questionnaire
☐	Did you make any contributions to federal or provincial political parties?	$	Hang on to your receipts in case the CRA asks for them.
☐	Did you make any charitable donations?	$	Hang on to your receipts in case the CRA asks for them.

Employment Expenses for Salaried Employees. Please check all employment expenses incurred for the year. For explanations on the deductions listed below, and to download forms, visit the Canada Revenue Agency's website.

Check if Applicable	Expenses	Required Items to be Submitted with Questionnaire
☐	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 Declaration of Conditions of Employment and T777 Statement of Employment Expenses.
☐	Were you employed as a long-haul truck driver and away from your home terminal for more than 24 consecutive hours at any point in the tax year?	TL2 Claim for Meals and Lodging Expenses completed by your employer. Please make sure all trip information is completed as well.
☐	Did you incur any expenses for supplies while employed as a teacher or early childhood educator?	Amount: $ _____. Hang on to your receipts in case the CRA asks for them. A list of eligible supplies can be found here.
☐	Other employment expenses not listed above?	Please provide any receipts and attach a description on a separate sheet.

Other expenses not listed above

Check if Applicable	Deductions	Required Items to be Submitted with Questionnaire
☐	Other deductions not listed above?	Please provide any receipts and attach a description on a separate sheet.

Section 4: Ontario Trillium Benefit and Ontario Senior Homeowners' Property Tax Grant (Ontario Residents Only)

Tick the box below if you are claiming the Ontario Trillium Benefit and Ontario Senior Homeowners' Property Tax Grant.

Check if Applicable	Required Items to be Submitted with Questionnaire
☐	Please complete and submit form 5006-TG ON-BEN **and** provide the following, if applicable. **Please note only one family member may claim this benefit**: Address of my Ontario principal residence, including postal code: - _____ - Number of months as resident: _____ - This is a long-term care facility: ☐ Yes or ☐ No Amount of property tax or rent paid for the year: - ☐ Property tax: $ _____ - ☐ Rent: $ _____. Landlord's name: _____ (this is the name of the person or company your rental payments were made to).

Section 5: Manitoba Homeowners, Renters, and Other Affordability Tax Credits (Manitoba Residents Only)

Tick the box below if you are claiming the Manitoba Homeowners, Renters, and/or Other Affordability Tax Credits.

Check if Applicable	Required Items to be Submitted with Questionnaire
☐	Please complete and submit form 5007-TC MB479 **and** provide the following, if applicable. **Please note only one family member may claim this benefit**: Address of my Manitoba principal residence, including postal code: - _____ - Number of months as resident: _____ - This is a long-term care facility: ☐ Yes or ☐ No Amount of property tax or rent paid for the year: - ☐ Property tax: $ _____ - ☐ Rent: $ _____. Landlord's name: _____ (this is the name of the person or company your rental payments were made to).

Section 6: 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 (initial or insert signature image): _____
Date: _____