

## Write It Off Tax Services

### 2016 Personal Income Tax Questionnaire

This questionnaire is designed to assist you in compiling the information necessary to prepare your 2016 personal tax return. Please return this form with your documentation.

Client Name: \_\_\_\_\_ DOB: \_\_\_\_\_

Spouse Name: \_\_\_\_\_ DOB: \_\_\_\_\_

Telephone: (\_\_\_\_) \_\_\_\_\_ Fax: (\_\_\_\_) \_\_\_\_\_

Email: \_\_\_\_\_

Dependents:

Name: \_\_\_\_\_ DOB: \_\_\_\_\_

Name: \_\_\_\_\_ DOB: \_\_\_\_\_

**If you are a first-time client, please include a copy of your most recent filed tax return and Notice of Assessment.**

**Please include a copy of your most recent Wealth Plan or Retirement Income Plan.**

Please check off the items below that you have included:

Important for 2016

- Details of foreign property, other than personal use property, if aggregate cost is in excess of \$100,000.** The foreign reporting requirements changed in 2014, if you are uncertain whether they apply to you, please let us know.

#### Income

- All T Slips** (T4, T4RSP, T4RIF, T4A (OAS), T4A(P), T4E, T5, T3 etc.)
- Universal Child Care Benefits** - RC62
- Rental Property Information** (Details of income, expenses, purchases and sales)
- Capital Gains/Losses** (attached realized gain/loss report -ask your broker/advisor if you have not received one)
- Did you dispose of any capital properties in the year?** Include selling date, original purchase price, sale price, selling costs and other relevant info.

- Self Employed or Commission Income.** Provide summary of all amounts invoiced/received and all expenses paid and capital items purchased. If using a home office, include a listing of for home expenses such as mortgage interest or rent, utilities, property taxes, insurance and condo fees.
- Other Income** (T4RSP, Workers Compensation benefits, foreign pension, stock options)
- Form T2200 Declaration of Conditions of Employment** This is to be completed and signed by your employer If you are deducting auto and home office expenses from employment income.

### **Deductions**

- Child Care Expenses** Name, SIN and Address of Caregiver
- Union or Professional fees** (other than on T4)
- RRSP Contributions**
- Attendant Care Expenses**
- Alimony or separation allowances paid** (attach copy of agreement or court order for spousal support signed after May 1 1997)
- Moving Expenses** (for new job or schooling at least 40km closer)
- Charitable donations**
- Adoption expenses**
- Contributions to federal and provincial political parties or candidates**
- Tuition and examination fees** (attached signed T2202/T2202A including amounts that can be transferred from dependants. Please have student sign transfer portion of form.)
- Public Transit passes**
- Children's fitness and arts receipts for the year**
- Medical expenses (attach receipts) and details of private health insurance premiums, including amounts paid while travelling.** To avoid duplication of claims and the retrieval of multiple receipts, you may wish to obtain a DETAILED annual summary from your service provider for the calendar year.
- Disability Amount for you or dependant** (if first time claim, attach T2201 signed by physician)
- 2016 Installments** (attached February 2017 notice)