

RS Accounting & Tax Services

Client Questionnaire Welcome!

TAX YEAR: 2022

Please complete the following forms where applicable and attach all necessary and related slips, receipts, lists, and other supplemental information.

Personal Information

	Name	Date of Birth (dd/mm/yyyy)	SIN #	Phone	
				Office	Ext.
Taxpayer					
Common-Law or Spouse					
Address				Mobile	
				Home	
Email					

Marital Status: Single Married Common-Law Separated Divorced Widowed

If married or common-law, should your return be filed jointly with your spouse's return? Yes No

If marital status changed during the year, provide date of change (dd/mm/yyyy) _____

Are you a U.S. or Canadian citizen? U.S. CAN

Do you wish to receive NOA's by Mail or Email? Mail Email

Residence

Province or territory of residence on December 31st: _____

Did you immigrate to Canada or emigrate from Canada during the year? Yes No

If yes, provide date of entry: _____ or date of departure _____

Dependants

Name	Relationship	DOB (dd/mm/yyyy)	SIN #	Physical/Mental Conditions? Yes/No	Income \$	Child Care Expenses \$

If any dependants in your home have a disability or are over 65, did you make any renovations for safety/accessibility? Yes No

Have you been approved for the disability tax credit? Yes No

Foreign Reporting – T1135

Did you own property outside of Canada worth more than \$100,000 during the year? Yes No

General Income/Deductions

T4 Slips – Employment Income? Yes No

T4A – Commission and self-employment? Yes. No

T4E – Employment Insurance? Yes No

T5007- Social assistance? Yes No

Do you have any employment income or taxable benefits not shown on the T4 slip? Yes No

Did you pay any union and professional dues? If yes, provide names of organizations and amounts paid below:

List of spousal/child support payments made or received? Yes No

List of moving expenses paid and for whom? Yes No

List of deductible employment expenses? Yes No

Do you have a signed T2200? Yes No

RRSP/PRPP (pool registered pension plan) Contributions

Do you have the T-slip for contributions made? Yes No

During the year, were any amounts repaid to a home buyers' plan or a lifelong learning plan? Yes No

Pension Income

T4A – Pension, retirement, and annuity income? Yes No

T4A (P) – Canada pension plan benefits? Yes No

T4A (OAS) – Old age security pension slip/foreign pensions? Yes No

T4A-RCA – Retirement compensation arrangements? Yes No

T4RSP – Registered retirement savings plan income? Yes No

T4RIF – Statement of income from a Registered Retired Income Fund? Yes No

Do you elect to split eligible pension income with your spouse or common-law partner? Yes No

Did you receive any amounts for the retirement income security benefit under the *Canadian Forces Members and Veterans Re-establishment and Compensation Act*? If so, provide required documentation. Yes No

Self-Employment/Business Income

- Do you own a business? Yes No
- Did you use a vehicle for business purposes during the year? If yes, do you have both the total vehicle expenses and the business mileage? Yes No
- Did you use a portion of your home for business? If yes, do you have a list of both total home expenses and business square footage? Yes No
- Do you have a list of all asset additions and disposals (including cars, equipment, etc.)? Yes No

Rental Income

- Did you own a rental property? If yes, do you have a statement of rental income? Yes No
 - Do you live in the rental property (in which case no CCA should be claimed)? Yes No
 - Did you change a rental property to a personal-use property or vice-versa, during the year? Yes No
- Please provide details:
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Donations

- Did you make any donations during the year? Yes No
- If yes, was this your first year? Yes No

Investment Income/Deductions

- T3 – Income from trust allocations? Yes No
- T5 – Investment income? Yes No
- T4PS – Income from profit sharing plans? Yes No
- T5013 – Partnership Income? Yes No
- T5008 – Income from securities transactions? Yes No
- Did you sell any crypto assets during the year? Yes No

Did you dispose of any property or investments? Please exclude all residences that were designated as a principal residence at any time during the year. If so, provide details in the following chart:

Description & Quantity	Date Acquired	Date disposed of	Sales proceeds	Cost	Expenses for Disposal

Did you dispose of any property or investments during the year that were designated as a principal residence? If so, provide the following details:

Description & Quantity			
Date Acquired			
Date Disposed of			
Sales Proceeds			
Cost			
Disposal Expenses			
Adjusted cost based at the time of disposition			
Which years was this property designated as a principal residence?			
If owned prior to 1982, the fair market value of property as at Dec 31 st , 1981			
If owned prior to 1982, adjusted cost base of property as at Dec 31 st , 1981			

Other Credits

- T2202 – Tuition amount? Yes No
- T2202 – Tuition amount claimed on transfer from dependant? Yes No
- Total amount for your student loan interest? Yes No
- Receipts/listing of all medical expenses paid in the year for yourself, spouse, and dependants? Yes No
- List of purchased, eligible teaching supplies? Yes No
- Public transit travel expenses for Ontario seniors? Yes No
- Receipts for political contributions? Yes No
- Are you eligible for the first-time homebuyer's amount? Yes No
- Did you sell your primary residence last year? Yes No
- Did you purchase a new home? Yes No Was this your first home? Yes No
- Did you use a home buyers plan? Yes No

Were you a volunteer firefighter last year? Yes No

Amount of property taxes/rent paid during the year and name of landlord/municipality?
Provide below: Yes No

T4A – (CRCB) Canada Recovery Caregiving Benefit or (CRSB) Canada
Recovery Sickness Benefit? Yes No

Amended T4A if the CRA adjusts your T4A amounts? Yes No

Payment summaries of repayment of COVID-19 benefits? Yes No

Did you receive a (CEBA) Canadian Emergency Business Account loan?
If so, how much? _____ Yes No

Did you receive the Canada Emergency Wage Subsidy? If so, how much? _____ Yes No

Did you receive the Canada Emergency Rent Subsidy? If so, how much? _____ Yes No

Did you receive any Canada Recovery Hiring Program payments? If so, how much? _____ Yes No

Home Office Deductions – Covid-19

Temporary Flat Rate Method

How many days did you work at home due to the pandemic, excluding stat holidays, vacation, and sick days. _____

Detailed Method – Completed and signed T220s or T2200 from employer? Yes No

Workspace Area Sq. Ft _____ Total area of home _____ Hours worked per week _____

Is your workspace a common area (shared)? Yes No

Expense receipt copies for: Rent, utilities, maintenance, internet fees, office supplies,
cell phone service, home insurance, computer, fax machines etc.? Yes No

Prior Year Tax Return Information

Do you have a copy of last year's Notice of Assessment? Yes No

If new to the firm, do you have your tax returns (with corresponding Notices of Assessment)
for the last three years? Yes No

If you claimed a loss carryback in any of the previous 3 years, do you have the
Notices of Reassessment? Yes No

Do you have your statement of installments paid for the year? Yes No

Do you have any other correspondence from the CRA to include? Yes No

If you would like your tax refund deposited directly into your account and have not already registered for direct
deposit, please include a void cheque or direct deposit form.