



THOROGOOD & PINCHES, CPA

INCOME TAX QUESTIONS

PLEASE FILL THIS IN AND RETURN WITH YOUR TAX INFORMATION

NAME: _____ TELEPHONE: _____

1) HAS YOUR ADDRESS CHANGED? Y / N If yes please provide your complete address

ADDRESS: _____ (Number, Street, P.O. Box) EMAIL: _____

CITY: _____ PROV: _____ POSTAL CODE: _____

2) HAS YOUR MARITAL STATUS CHANGED? Y / N If yes please provide the following:

MARITAL STATUS: _____ DATE OF CHANGE: _____

SPOUSE'S NAME: _____ SPOUSE'S DATE OF BIRTH: _____

SPOUSE'S SOCIAL INSURANCE NUMBER: _____

3) HAVE YOU SOLD YOUR HOME OR ANY PROPERTY? Y / N If yes please provide the following:

ORIGINAL YEAR OF PURCHASE: _____ SALE PRICE: _____ SALE DATE: _____

4) DO YOU HAVE ANY NEW DEPENDENTS: Y / N If yes please provide:

NAME: _____ DATE OF BIRTH: _____ RELATIONSHIP: _____ SIN: (if they have one) _____

5) BUSINESS, FARM AND PROPERTY INCOME - HAVE YOU....

STARTED A NEW BUSINESS? Y / N _____ CEASED OPERATING A BUSINESS? Y / N _____

Have attached business income/expenses? Y / N _____ Are we filing your GST Return? Y / N _____

Have enclosed details of rental property income? Y / N _____ Any changes in properties owned? Y / N _____

Did you receive the CEBA? \$40,000 / \$60,000? Y / N _____ Did you receive any wage subsidies? Y / N _____

6) INCOME AND DEDUCTIONS: Please include the following if applicable

INCOME

- ____ Notice of Assessment (prior year)
- ____ All income T-Slips
- ____ T4E - EI Benefits
- ____ T5007 - WCB or Social Assistance
- ____ T5008 - Sale of Securities
- ____ T5013 - Partnership Income
- ____ T5018 - Income as Subcontractor
- ____ Foreign Income Records

DEDUCTIONS

- ____ RRSP - Contributions
- ____ RRSP - Home Buyers Loan Payments
- ____ Union Dues Receipts
- ____ Moving Expenses
- ____ Child Care Expenses
- ____ Investment Fees
- ____ Medical Receipts include mileage over 40km
- ____ Donation Receipts
- ____ Political Receipts
- ____ Tuition Receipts (T2202) (log into student portal & have student sign page 2)
- ____ Student Loan Interest
- ____ Tax Installments Paid

7) DID YOU OWN FOREIGN PROPERTY WITH A VALUE IN EXCESS OF \$100,000 CANADIAN: Y / N

8) OTHER THINGS TO CONSIDER:

DID YOU HAVE TO WORK FROM HOME DUE TO COVID, IF SO HOW MANY DAYS?

WOULD ANYONE IN YOUR FAMILY QUALIFY FOR THE DISABILITY TAX CREDIT?

HAVE YOU BOUGHT YOUR FIRST HOME OR FIRST IN FOUR YEARS?

DID YOU RENOVATE YOUR HOME TO MAKE IT MORE ACCESSIBLE (DISABILITY / SENIORS)?

DO YOU HAVE EDUCATOR SUPPLY EXPENSES?

DO YOU HAVE EMPLOYMENT EXPENSES? PLEASE ASK US FOR A DETAILED FACT SHEET.

Do you operate a website for business purposes? Y / N _____

If so, please list website addresses: _____

ADDITIONAL INFORMATION: _____
