PPL

PARKER PRINS LEBANO

Chartered Professional Accountants
Professional Corporation

2017 PERSONAL INCOME TAX QUESTIONNAIRE

This questionnaire is designed to assist you in compiling the information necessary to prepare your 2017 personal tax return. Please return this form with your documentation.

Client Name ____

Telephone (   ) ______________ Fax (   ) ______________ E-mail ______________________

Please indicate address only if changed since 2016 income tax return ______________________

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Marital status (if changed in 2017, indicate change and date) ______________________

☐ If you are a first-time client of PPL, OR there are any changes for wholly-dependent persons, please attach a list and indicate for each dependent: name, address if different, relationship, birth date, S.I.N., and net income. Note infirmity, if any.

Please check items that you have attached:

IMPORTANT FOR 2017

☐ ***Details of foreign property held, other than personal use property, if aggregate cost is in excess of $100,000 at any time during the year.*** The foreign reporting requirements changed in 2014 – if you are uncertain whether they apply to you, please let us know as soon as possible. Please see the attached letter for further details.

☐ ***Details of the sale of your principal residence if sold in 2017, including year of acquisition, proceeds of disposition, and the complete address of the property.***

INCOME

☐ All T-Slips (i.e. T4, T4A(OAS), T4A(P), T4E, T5, T3, etc.)

☐ Universal Child Care Benefits – RC62

☐ Interest, Dividends and other Investment Income – T5/T600

☐ Business or Professional – Financial Statements or T5013

☐ Rental Property (attach details of income, expenses, purchases and sales)

☐ Capital Gains/Losses (attach realized gain/loss report – **ask your broker if you have not received one**)

☐ Did you dispose of any capital properties this year? (Attach copies of sales detail and original purchase documentation)

☐ Spousal support (provide copy of post-April 30, 1997 agreement or election, if changed or not previously provided)

☐ Other Income (e.g., stock options, annuities, scholarships, bursaries, research grants, RRSPs – attach T4RSP, Workers' Compensation benefits, foreign pension or investment income)

1796 Courtwood Crescent Ottawa, Ontario K2C 2B5

Tel: (613) 727-7474 • Fax (613) 727-3715 • www.parkerprinslebano.com

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DEDUCTIONS

- ☐ Registered Retirement Savings Plan contributions for 2017 and the 1st 60 days of 2018 (attach receipts) (Attach T10 – Personal Adjustment Reversal, if you received one)
- ☐ Annual union, professional dues (attach receipts if not on T4 slip)
- ☐ Child care expense (attach receipts)
  (a) for individual providers, include S.I.N. and address ____
  ____
  (b) for summer camps, indicate number of weeks that were overnight ___________________________
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- ☐ Attendant care expenses (attach receipts)
- ☐ Allowable business investment losses (refer to Capital Gains/Losses above)
- ☐ Moving expenses (attach receipts). Indicate distance moved to new employment _________________
- ☐ Spousal support paid (include name(s), S.I.N., and address of recipient; attach copy of agreement or court order for spousal support which was signed on or after May 1, 1997 or election, if changed or not previously provided) ____
- ☐ Commission and employment expenses (include details and T2200 or TL2)
- ☐ Carrying charges on non-registered accounts (interest on money borrowed to earn taxable dividend and interest, investment counsel fees, interest for limited partnerships)
- ☐ Other deductions and expenses (attach receipts)
- ☐ Federal and provincial political contributions (attach receipts)
- ☐ Charitable donations (attach receipts)
  (Provide details of donations of securities) ____
- ☐ 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 deduction for you or dependent (if first time claim, attach T2201 signed by physician)
- ☐ Adoption expenses
- ☐ Tuition and examination fees (attach signed T2202/T2202A including amounts that can be transferred from dependents. **Please have the student sign the transfer portion of the form prior to submission.**
- ☐ Monthly public transit passes until **June 30, 2017** (include passes for your spouse and children under 19; **if you are a senior, please provide passes for the full year**)
- ☐ Interest paid on student loans (attach reporting slip)
- ☐ Receipts for home modifications if you are 65 or older, or an individual eligible for the T2201 (disability tax credit certificate)
- ☐ Confirmation statement/letter from your employer, and receipts for the Teacher and ECE School Supply Tax Credit

OTHER

- ☐ 2017 Installments (attach February 2018 notice – total for 2017 is on the reverse)
- ☐ Attach copy of 2016 notice(s) of (re)assessment
- ☐ Property tax amount for 2017 or receipt(s) for rent paid on primary residence

COMMENTS ____

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