



**PARKER PRINS LEBANO**

**Chartered Professional Accountants**  
Professional Corporation

**IMPORTANT**

**2020 PERSONAL INCOME TAX QUESTIONNAIRE**

In order to ensure our records are up to date, please confirm your personal information by completing Part 1 of this form immediately below. Please return this form with your tax documents.

**PART 1** - In light of the COVID-19 pandemic, we encourage clients to adopt one of the two **password protected PDF** delivery options. Nonetheless, we continue to offer paper delivery options. Kindly select one of the following delivery methods for your personal income tax package:

- Password protected PDF - attachment to email
- Password protected PDF - link to Sharefile via email
- Paper – mail
- Paper – pick-up after May 15<sup>th</sup>

Client Name \_\_\_\_\_

Telephone ( ) \_\_\_\_\_ Fax ( ) \_\_\_\_\_ E-mail \_\_\_\_\_

Please indicate address only if changed since 2019 income tax return \_\_\_\_\_

Marital status (if changed in 2020, 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 2020**

- Did your employer change your work requirements to “work from home”, in 2020 due to the COVID-19 pandemic?**
  - yes - since March 13, 2020
  - yes - # of days = \_\_\_\_\_
- 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 2020, 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, T5008, etc.)
- 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)

**DEDUCTIONS**

- Registered Retirement Savings Plan contributions for 2020 and the 1<sup>st</sup> 60 days of 2021 (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 \_\_\_\_\_
  - \_\_\_\_\_
- 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.**)
- 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). This is only applicable if the modifications specifically improve accessibility, allowing you to potentially stay in your home longer
- Confirmation statement/letter from your employer, and receipts for the Teacher and ECE School Supply Tax Credit

**OTHER**

- 2020 Installments (attach February 2021 notice – total for 2020 is on the reverse)
- Attach copy of 2019 notice(s) of (re)assessment
- Property tax amount for 2020 or receipt(s) for rent paid on primary residence residence
- Receipts for Canadian digital news subscriptions

**COMMENTS** \_\_\_\_\_

\_\_\_\_\_