

# 2018 Personal Income Tax Questionnaire

Client Surname \_\_\_\_\_ Given Names \_\_\_\_\_

Telephone No. \_\_\_\_\_ Fax No. \_\_\_\_\_ E-mail \_\_\_\_\_

Any address changes? \_\_\_\_\_

Any change in marital status? \_\_\_\_\_ Date \_\_\_\_\_

Please check items that you have attached:

- Notice of Assessment from Canada Revenue Agency (CRA) for your 2017 tax return.
- 2018 Income tax installments, if any. (Attach February 2019 notice)**
- Details of any AgriStability advances received during the year.

## Income

- Employment - T4
- UFA, Other Co-operatives, etc - T4A
- Old Age Security Pension - T4A (OAS)
- Canada Pensions and other pensions - T4A(P), RRIF withdrawals - T4RIF
- Alberta Seniors Benefit
- AgriStability, AFSC interest - AGR-1
- Interest, dividends and other investment income - T5/T600, T5013
- Mutual Funds and other Trust Income – T3, statement of trust income
- Universal Child Care Benefits – RC62
- Other income - RRSP withdrawals - T4RSP
- Spouse's income (include Social Insurance Number and birth date)
- Record of farm, business or rental income
- Capital Gains/Losses  
Did you dispose of any capital properties (Real Estate including your principal residence, Shares, Mutual Funds etc.) this year?  
Please include legal documents regarding real estate sales (statement of adjustments, statements of trust funds) original cost and any capital improvements or mutual fund exchanges including income re-investments and returns of capital.  
Please include statements from brokers detailing “Realized Gains or Losses” for the year.

## Deductions

- Employment or commission income expenses paid in the year. Expenses for travel, courses, conventions, etc required by employer and not reimbursed by employer
- Donation receipts
- Medical receipts, mileage, travel costs, premiums paid for medical travel insurance, premiums paid for private insurance (including amounts deducted from payroll)
- R.R.S.P., union dues, and political donation receipts
- Details of any RRSP, Home Buyer Plan or Lifelong Learning withdrawals and repayments
- Interest paid to bank, Farm Credit Corp., finance contracts, etc. for business or investment purposes
- Tuition and education deduction slips, and interest on student loans
- Investment council fees
- Details of any alimony payments

- Receipts for tools purchased for employment for trades people and apprentice mechanics
- Receipts for supplies purchased by teachers and early childhood educators
- Adoption expenses paid
- Moving expenses paid
- Details of salaries paid, amounts paid to spouse and record of deductions remitted
- Details of capital purchases (including Real Estate and Special Areas lease purchases and costs to deed tax-recovery leases)
  - a) Date of purchase and delivery
  - b) Total price
  - c) Trade-in, description and value received
- Record of farm, business or rental expenses

### **Additional Personal Exemptions**

- If you or any of your dependents have difficulty walking, seeing, eating or thinking you may qualify for the Disability Tax Credit (DTC). If this is the first time you believe you are eligible for the DTC, please contact us for the necessary forms.
- If you are supporting other relatives who are living with you, provide the following information and note if any of these individuals have a mental or physical infirmity

Name of Relative	Relationship	Birth Date	Net Income
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### **Other**

- Details of foreign property, other than personal use property, if the aggregate cost is in excess of \$100,000.
- Details of any homes acquired or sold in the year.

### **Wholly Dependent Children**

Name of Child	Relationship	Birth Date
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- Child care expenses including camps

### **AgriStability**

- Documentation received from any AgriStability claims if not previously submitted to us
- Purchased inventory as at December 31, 2018 summarized by year of purchase. (Quantity, cost and market value)
- Raised inventory as at December 31, 2018. (Quantity and market value at that time)
- Crop insurance premium notice and post-harvest report
- Crop insurance awards received after December 31, 2018