

# 2024 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 2024 tax return.
- 2024 Income tax installments, if any. (Attach February 2025 notice)**

## 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
- 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, 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.

Please include statements from brokers detailing “Realized Gains or Losses” for the year, mutual fund exchanges including income re-investments and returns of capital.

## Deductions and credits

- 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). Consider requesting a prescription report from your pharmacist.
- 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 or receipts for fees paid for an occupational, trade or professional exam
- 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
- Were you required to make a repayment of funds previously received under one of the COVID-19 relief programs programs?

### **Additional Personal Exemptions**

- If you or any of your dependents have difficulty with walking, mental functions, dressing, feeding, hearing, speaking, vision, bowel or bladder functions or require life-sustaining therapy 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, including address, year of purchase and proceeds of disposition. If you sold your home during the year and own another property that may qualify as a principal residence please discuss this with your accountant.
- Has the banking information previously provided to the CRA changed or would you like to provide it for direct deposit purposes?

## Wholly Dependent Children

Name of Child

Relationship

Birth Date

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- Child care expenses including camps

## Farming

- Purchased inventory as at December 31, 2024 summarized by year of purchase. (Quantity, cost and market value)
- Raised inventory as at December 31, 2024 (Quantity and market value at that time)

## If you participate in AgriStability we will also require:

- Documentation received from any AgriStability claims if not previously submitted to us
- Crop insurance premium notice and post-harvest report
- Crop insurance awards received after December 31, 2024
- Details regarding any crop insurance awards that have been deferred or are still outstanding, or any payments made in relation to unfulfilled commodity sales contracts