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2009 PERSONAL INCOME TAX QUESTIONNAIRE

This questionnaire is designed to assist you in compiling the information necessary to prepare your 2009 personal tax return. Please return this form with your documentation.

Client Name _____

Telephone (_____) _____ Fax (_____) _____ E-mail _____

Please indicate address only if changed since 2008 income tax return

Marital status (if changed in 2009, indicate change and date) _____

Please check items that you have attached:

INCOME

- Employment – T4
- Old Age Security – T4A(OAS)
- Canada Pension Plan benefits – T4A(P)
- Retirement Income – T4A for pensions, T4RSP, T4RIF
(attach details of spouse's income to determine if pension splitting is beneficial)
- Employment Insurance – T4E
- Universal Child Care Benefits – RC62
- Interest, Dividends and other Investment Income – T5/T600
- Mutual Funds and other Trust Income – T3
- Limited Partnership – T5013
- Business or Professional – Financial Statements or T5013
- Rental Property (attach details of income, expenses, purchases and sales)
- Capital Gains/Losses
- Did you dispose of any capital properties this year?
(attach copies of sales detail and original purchase documentation.)
- Alimony (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).



DEDUCTIONS

- Attach all receipts and summary for the home-renovation tax credit (HRTC)
- Registered Retirement Savings Plan contributions (attach receipts)
(attach T10 – Personal Adjustment Reversal, if you received one.)
- Annual union, professional dues (attach receipts)
- 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 in-residence _____
- 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 _____
- Alimony or separation allowances paid (include name(s) and address(es) of recipients; 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 (interest on money borrowed to earn dividend and interest, investment counsel fees, interest for limited partnerships, safety deposit box)
- Other deductions and expenses (attach receipts)
- Federal and provincial political contributions (attach receipts)
- Charitable donations (attach receipts)
(provide details of gifts in kind, e.g., securities) _____
- Medical expenses (attach receipts) and details of private health insurance premiums, including amounts paid while travelling (for dependants over age 18, up to \$10,000 can be transferred)
- Disability deduction for you or dependant (if first-time claim, attach T2201 signed by physician)
- Receipts for child fitness tax credit (for dependants who were under age 17 at the end of the year; age 19 if eligible for disability credit)
- Adoption expenses
- Tuition fees (attach T2202/T2202A including amounts that can be transferred from dependants)
- Details of public transit passes
(include passes for your spouse and children under 19 at the end of the year) _____
- Labour-sponsored funds – T5006
- Interest paid on student loans (attach reporting slip)
- For wholly-dependent persons, please attach list and indicate for each dependant: name, address if different, relationship, birth date, S.I.N., and net income. Note infirmity, if any.

OTHER

- Attach all details regarding your tax-free savings account (TFSA)
- 2009 Installments (attach February 2009 notice). Total remitted: \$ _____
- Attach copy of 2009 assessment notices and other correspondence from the Canada Revenue Agency
- Amount of any contributions to or distributions from, or loans to or from foreign trusts in 2009
- Details of foreign property, other than personal use property, if aggregate cost is in excess of \$100,000 as well as any investment in "foreign affiliates".

COMMENTS

