



2023 PERSONAL INCOME TAX QUESTIONNAIRE

Client Name(s): _____

Telephone: _____ Email Address to send return: _____

Address (only if changed since 2022 income tax return): _____

Marital status (if changed in 2023, indicate change and date): _____

Please note that if you lived continuously with another person in a conjugal relationship for more than 12 months or had a child with someone, CRA considers you to have a common-law partner.

New family members, if any:

Name of new family member: _____

By birth or adoption Date of birth or adoption: _____

Did you sell or leave your home or cottage in 2023? Yes No

(If Yes, please provide details)

Sold Price: \$ _____ Address: _____

Year you purchased: _____

Please check the items attached:

INCOME

- Employment – T4
- Retirement Income – T4A(OAS), T4A(P), T4A for pensions, T4RSP, T4RIF
- Employment Insurance – T4E
- Interest, Dividends and other Investment Income – T3/T5/T600
- Business or Professional – include profit and loss statement, financial statements or T5013
- Rental Property (attach details of income, expenses, purchases and sales)
- Capital Gains/Losses (attach capital gains and loss schedule)
- Did you dispose of any capital properties this year? (attach copies of sales detail and original purchase documentation.)
- Alimony/spousal support \$ _____
- Other Income (e.g., stock options, annuities, scholarships, bursaries, research grants, RRSPs – attach T4RSP, Workers' Compensation benefits).

DEDUCTIONS

- RRSP (Registered Retirement Savings Plan) contributions (attach receipts)
- Annual union, professional dues (attach receipts)
- Child care expense (attach receipts): For individual providers, include SIN: _____

For overnight summer camps, indicate number of weeks: _____

- Moving expenses (attach receipts). Indicate distance moved to new employment (**must be greater than 40 km**)
- Carrying charges (interest on money borrowed to earn investment income, investment counsel fees, interest for limited partnerships)
- Federal and provincial political contributions (attach receipts)
- Charitable donations (attach receipts) (provide details of gifts in kind, e.g., securities)
- Medical expenses and health insurance premiums, including travel (must be greater than lesser of 3% of your income and \$2,635)
- Disability deduction for you or dependant (if first-time claim, attach T2201 signed by physician)
- Adoption expenses (attach receipts)
- Tuition fees (attach T2202/T2202A including amounts that can be transferred from dependants)
- Interest paid on student loans (attach reporting slip)
- Did you purchase your first home in 2023 to receive Home Buyer's Tax Credit:
- If you are claiming auto or home office, indicate business use %: Auto _____ % Office _____ %
- If you are a teacher, indicate amounts spent on school supplies in the year: \$ _____
- Did you pay rent in Manitoba in 2023 and are you claiming it? If so please indicate total paid \$ _____
(only one claim per dwelling can be made)
- Do you own non-Canadian property (e.g., real estate, US stocks) costing more than CAD\$100,000?**
(If yes, provide details as you must file a T1135)

ADDITIONAL INFORMATION OR COMMENTS:
