



# 2020 PERSONAL INCOME TAX QUESTIONNAIRE

Client Name(s): \_\_\_\_\_

Telephone: \_\_\_\_\_ Email Address to send return: \_\_\_\_\_

Address (only if changed since 2019 income tax return): \_\_\_\_\_

**Marital status** (if changed in 2020, 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 your home or cottage in 2020?** Yes  No

*(If Yes, please provide details)*

Sale Price: \$ \_\_\_\_\_ Address: \_\_\_\_\_

Year of acquisition: \_\_\_\_\_

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 \$ \_\_\_\_\_
- Other Income (e.g., stock options, annuities, scholarships, bursaries, research grants, RRSPs – attach T4RSP, Workers' Compensation benefits).

### DEDUCTIONS

- I worked primarily from home for at least four consecutive weeks in 2020 due to COVID-19 and would like to use the simplified method to claim a home office deduction. Working days home office used in 2020 (typically weekdays only): \_\_\_\_\_
- 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 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 3% of your income to max of \$2,352)
- 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 purchased your first home in 2020 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 2020 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:**

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