

2019 PERSONAL INCOME TAX QUESTIONNAIRE

This questionnaire is designed to assist you in compiling the information necessary to prepare your 2019 personal income tax return. Please contact your MRR advisor if you have any questions regarding any items noted on the checklist; return this form with your documentation.

Name: _____

Address: Street _____

City, Province _____ Postal Code _____

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

Date of Birth: MM \ DD \ YYYY Province of Residence: _____

Do you want to provide your e-mail address to CRA in order to receive on-line mail? YES NO

Is your home address the same as your mailing address? YES NO

If no, please note the mailing address: _____

Did you dispose of a residence held for your personal use in 2019?
 (if yes provide sale agreement of disposition and cost and date of original purchase) YES NO

Are you a Canadian Citizen? YES NO

If yes, do you authorize the Canada Revenue Agency to provide your name, address and date of birth to Elections Canada for the National Register of Electors? YES NO

Did you hold any Foreign Property at any time during 2019 with an aggregate cost greater than \$100,000?
 (if yes provide details, this includes any real estate, deposits in foreign banks, shares in foreign corporations, etc.) YES NO

CRA is transitioning all payments to direct deposit, if you are not currently setup for direct deposit please provide your banking information below or provide a Void cheque (information needed for each taxpayer)

XXXXX BRANCH NUMBER XXX INSTITUTION NUMBER ACCOUNT NUMBER

Marital Status: Single Married Separated Divorced Widowed Common-Law

If changed in 2019, note date: _____

Spouse or common-law partner information (if MRR is not preparing your returns together)

Name: _____

SIN: _____

Net Income noted on line 236 of the T1 return \$ _____

Is your spouse self-employed? YES NO

If advantageous, would you like us to split your eligible pension income? YES NO

Dependant information: (includes dependants over the age of 65)

Name	Birth Date	SIN	Relationship
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____



Please check items that you have attached or that are applicable:

INFORMATION SLIPS:

<i>Description</i>	<i>Form</i>	<i>Check if included</i>
Employment	T4, T4A	<input type="checkbox"/>
Old Age Security	T4A (OAS)	<input type="checkbox"/>
Canadian Pension Plan Benefits	T4A (CPP)	<input type="checkbox"/>
Pension, Disability or Scholarship/Bursary Payments	T4A	<input type="checkbox"/>
Employment Insurance	T4E	<input type="checkbox"/>
RRSP or RRIF income	T4RSP and T4RIF	<input type="checkbox"/>
Mutual Funds and other Trust Income	T3	<input type="checkbox"/>
Interest, Dividends and other Investment Income	T5/T600	<input type="checkbox"/>
Did you receive dividends interest from a Private Company of which another family member is a shareholder		<input type="checkbox"/> YES <input type="checkbox"/> NO
Partnership Income	T5013	<input type="checkbox"/>
Labour-Sponsored Funds Tax Credit	T5006	<input type="checkbox"/>
Social Assistance, Workers Compensation	T5007	<input type="checkbox"/>
Statement of Securities Transactions	T5008	<input type="checkbox"/>
Retroactive Universal Child Care Benefit	RC62	<input type="checkbox"/>
Working Income Tax Benefits	RC210	<input type="checkbox"/>
Tuition Fees	T2202	<input type="checkbox"/>

OFFICIAL RECEIPTS:

<i>Description</i>	<i>Check if included</i>
Taxable RESP or RDSP income or withdrawals	<input type="checkbox"/>
Registered Retirement Savings Plan Contributions	<input type="checkbox"/>
Charitable Donations	<input type="checkbox"/>
Political Donations	<input type="checkbox"/>
Professional Fees or Union Dues	<input type="checkbox"/>

OTHER INCOME/DEDUCTIONS

<i>Description</i>	<i>Check if included</i>
<i>Business</i>	
Listing of profession or self-employment income and expenses Include GST/HST information if applicable	<input type="checkbox"/>
Did you employ an apprentice or co-op student during 2019?	<input type="checkbox"/> YES <input type="checkbox"/> NO
<i>Rental</i>	
Listing of rental property income and expenses Include GST/HST information if applicable	<input type="checkbox"/>
<i>Investment income</i>	
Listing of investments which accrued interest is required to be reported and for which a tax reporting form has not been received	<input type="checkbox"/>
Carrying charges and interest paid to earn investment income (includes investment counsel fees, interest for limited partnerships, accounting fees)	<input type="checkbox"/>
Details of dispositions of capital property (stocks, mutual funds, real estate). Include the original cost, proceeds and expenses on disposition	<input type="checkbox"/>
Allowable business investment losses	<input type="checkbox"/>
Security options deductions	<input type="checkbox"/>
<i>Family</i>	
Alimony or separation allowances paid, include name(s), address(es) of recipient(s) and amounts paid (include court order if not already provided)	<input type="checkbox"/>
Child care expenses; for individual providers include SIN and address, for summer camps indicate number of weeks that were in-residence	<input type="checkbox"/>
Adoption related expenses	<input type="checkbox"/>



OTHER INCOME/DEDUCTIONS continued

Description

Form

Check if included

United States

Are you a US citizen or hold a valid green card?

YES NO

Employment

W2

Interest, dividend income

1099-INT 1099-OID 1099-DIV

Income from sales of stock or other property

1099-B 1099-S

US Personal Tax Return

1040 1040NR

Other employment/business

Commission and employment expenses

T777, T2200

Eligible teaching expenses

T777, T2200

Meals and lodging expenses

TL2

Details of tools acquired

Automobile expenses (include kilometres driven for personal and business use)

Home office expenses

Medical

Listing of medical expenses (include travel expenses and private health premiums)

Attendant care expenses

Disability deductions for yourself or dependants (include signed T2201 if first time)

Dependants may include relatives in your care

Your Pharmacy may be able to print detail for the year in lieu of tracking individual slips

Other

Foreign Pensions

Moving expenses (include distance moved to new employment)

Interest paid on student loans

Film and video production eligible for tax credit

Expenses qualifying for Home Accessibility Tax Credit

Canadian Exploration/Development Expenditures

Business research and development

Clergy residence deduction

T1223

Other income/deductions not mentioned above

OTHER GENERAL ITEMS

If this is the first time we are preparing your return, include a copy of your 2018 T1

2018 Notice of assessment from CRA

2019 Instalment payments (attach CRA statement)

\$ _____

2019 Ontario Property Tax Bill

2019 rent paid

Home Buyers Plan or Lifelong Learning Plan withdrawals/ CRA statement

First time home buyers, details of purchase

Amount of any distributions or loans from foreign trusts received in 2019

Details of any share ownership in foreign corporations where you own > 1% and together with related parties own > 10%

COMMENTS
