



## 2020 Personal Income Tax Questionnaire

### Section 1: Personal Information

	Taxpayer	Spouse (if applicable)
Name		

Please only complete this section if your family's information is new or has changed in the year:

SIN		
Birth Date (YYYY-MM-DD)		
Title (ie: Dr., Mr., Ms., Mx.)		
Phone		
E-mail		
Home Address		

Marital Status:    Married    Single    Common-law    Separated    Divorced    Widowed

If your marital status changed in the year, provide the date of the change (YYYY-MM-DD) \_\_\_\_\_

Please list all dependants of you or your spouse and if they will have their personal tax return prepared by FWH:

Name	Relationship	Birth Date (YYYY-MM-DD)	SIN	Return Required?

Is FWH preparing a 2020 tax return for your spouse?  Yes    No    NA

If no, provide the income amount from line 23600 of their 2020 tax return: \_\_\_\_\_

Did any taxpayers immigrate to Canada or emigrate from Canada during the year?  Yes    No

Date of entry into Canada (YYYY-MM-DD) \_\_\_\_\_ / Date of departure (YYYY-MM-DD) \_\_\_\_\_

Did any of the taxpayers become deceased during the year?  Yes  No

If yes, provide date of death (YYYY-MM-DD) \_\_\_\_\_, a copy of the will and the death certificate.

## Section 2: Disposal of a principal residence (primary home)

Did any taxpayers dispose of a principal residence (primary home) during the year?  Yes  No

If yes, please provide:

- Property address \_\_\_\_\_
- Year acquired \_\_\_\_\_
- Selling price \$ \_\_\_\_\_
- Percentage owned by each of you and your spouse \_\_\_\_\_

If the home was not your principal residence for the entire period of ownership, please also provide:

- Original purchase price \$ \_\_\_\_\_
- Amounts paid for significant renovations \$ \_\_\_\_\_
- Years that it was not your principal residence (YYYY-YYYY) \_\_\_\_\_

Note you will not have to pay tax on any capital gain from selling your house if it was your principal residence for all years that you owned it.

## Section 3: Canada Revenue Agency Questions

Did any taxpayers own or hold foreign property with a total cost greater than C\$100,000 any time in the year?  Yes  No

If yes, provide detail of foreign property \_\_\_\_\_

## Section 4: Income

Please indicate which of the following sources of income apply to you or any family members. Enclose all original tax and other information slips supporting these sources of income.

- T4** (employment), **T4A** (self-employment/scholarship), **T4(OAS)** or **T4A(P)** (pension), **T4E** (employment insurance)
- NEW – COVID benefit income** – Please complete this section if any taxpayers received the CERB benefit in 2020. Please also indicate the total amount of any CERB repayments to CRA before December 31, 2020:

Canada <b>Emergency Response Benefit</b> (CERB) (Mar 15 to Sept 26)	Taxpayer: _____	Repayment \$ _____
	Taxpayer: _____	Repayment \$ _____

- Business or professional income** - Provide income and expense information and/or supporting documents. Refer to the schedule on our website for a listing of the deductible expense items: [Business or Professional Income Schedule](#)
- T4RSP** (RRSP withdrawals), **T4RIF** (RRIF income)
- T3, T5, T5008** (investment income), **T5013** (limited partnerships or other tax shelters) - Provide all supporting documentation received, including any statement of investment income accompanying T3 or T5 slips.
- Summary of capital gains and losses** - Capital gains and losses arise upon the disposition of assets including shares, trust units, mutual fund units, bonds, and other real property such as a vacation or rental property.

For non-registered personal investments, this information can be provided by obtaining a statement of security dispositions from your investment advisor

For assets disposed, provide purchase information including purchase date, original cost, and foreign exchange rate at time of purchase (if applicable). Also provide information about the sale including the date, proceeds of disposition, and rate of foreign exchange (if applicable).

Provide the statement of adjustments for purchases and/or dispositions of real property excluding your principal residence.

- Rental income** - Provide income and expense information and/or supporting documents. Refer to the schedule on our website for a listing of the deductible expense items: [Rental Income Schedule](#)
- Spousal support** - Provide the amount of spousal support payments received during the year.
- Any other sources of income** - Provide details and/or explanations:

Additional comments:

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## Section 5: Deductions

Please indicate which of the following deductions apply to you or a family member.

- RRSP contributions** - Provide receipts for RRSP contributions for the year. Note, the CRA does not accept bank statements as proof of contribution.
- Carrying costs related to investment income** - List all investment counsel fees, interest paid on investment loans per financial institution and overdraft interest paid on broker accounts. Also provide copies of all supporting documentation received from the investment broker.
- Union and professional dues** – Provide receipts showing amounts paid during the year. To be deductible, dues must have been paid personally, and not by an employer or partnership.
- Employment expenses** - If your employment contract required you to pay expenses for which you did not receive an allowance from your employer, you may claim certain expenses. Provide details and a signed form T2200 from your employer. Refer to the schedule on our website for a listing of the deductible expense items: [Employment Expense Schedule](#)
- Childcare expenses** - If payments are made to an individual, include the name and social insurance number of the childcare provider. Also include receipts for summer camps attended by your child.
- Spousal support** - Provide the amount of spousal support payments made during the year.
- Moving expenses** - If you moved more than 40 km to be closer to a place of employment or study, then provide supporting details and receipts for your moving expenditures. Refer to the schedule on our website for a listing of the deductible expense items: [Moving Expense Schedule](#)

Additional comments:

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## Section 6: Tax Credits

Please indicate which of the following tax credits apply to you or any family members

- Medical expenses** - Amount eligible is the **least amount of \$2,421 or 3% of net income**.
  - For expenses other than prescription drugs include all receipts in respect of your immediate family, net of insurance reimbursement. Also provide the premiums paid for private health insurance, if any.
  - For prescription drugs, provide a **listing from your pharmacy** showing the amounts paid in 2020. Individual receipts should be provided only for prescriptions not already included on the pharmacy listing.
  - Note that registered **massage therapy** is an eligible medical expense **only for** residents of British Columbia, Ontario, New Brunswick, and Newfoundland. Provide registered massage therapy receipts only if you are a resident of one of these provinces.
- Charitable or political donations** - Include any 2020 charitable donation receipts as well as those from the prior five years that have not been claimed for tax purposes. *Note that Go Fund Me donations are not deductible unless paid to a registered charity.*

- Tuition and education** - Provide form **T2202** from educational institutions in Canada. Most schools make these forms available for download by students from their student account on the school website. Where tuition fees are paid to a qualifying institution outside Canada, Form TL11A should be filled out and signed by a representative of the foreign university.

If applicable, complete and sign the T2202 or TL11A in the section designating a transfer of education credits to a spouse or parent.

- Interest on student loans** - Interest on student loans administered under either the Canada or a Provincial Student Loans Program qualifies for a tax credit. Provide a statement from the financial institution administering your student loan showing interest paid in the year. Note, interest paid for any other indebtedness, such as bank loans or lines of credit is not eligible.
- Disability** - If you or a dependant is “markedly restricted” in your daily living activities because of mental or physical impairment, provide a signed form T2201 only if you have **not** provided the form to the CRA in a prior year.
- Adoption expenses** - Eligible expenses relating to the adoption of a child including adoption agency fees, court costs, legal expenses, travel costs, and other mandatory expenses. The maximum claim is \$16,255 for each child adopted. The claim is made in the year of the later of these two dates: the adoption order is recognized by a government in Canada or the child begins to live permanently with you.
- First-time home buyers** - To qualify for the first-time home buyers’ tax credit, you or your spouse or partner must not have owned another home in 2020 or four preceding calendar years. Provide us with a copy of the statement of adjustments that you received from your lawyer when you purchased your home.
- Eligible educator school supply tax credit** – For more information, click here [Eligible educator school supply credit information](#)
- Home accessibility expenses** – For more information, click here [Home accessibility expenses](#)

**Additional comments:**

#### Section 7: Other

- 2019 Personal income tax return** - Please provide a copy of your return if not prepared by Flaim Wolsey Hall.
- Investment or bank accounts** - Did you close a bank account or investment account during the year?  Yes  No
- If yes, specify: \_\_\_\_\_

All information and receipts submitted electronically to Flaim Wolsey Hall? Please avoid multiple submissions.  Yes  No

#### Section 8: **NEW** – Temporary COVID-19 Measures - Home Office Expense

Do you have a corporation through which you claim a home office expense deduction?  Yes  No

**If yes, please proceed to Section 9.**

If no, did any taxpayers work from a home office during the year?  Yes  No

**If no, please proceed to Section 9.**

If yes, please indicate which of the following criteria are met from March 16 onward:

- The taxpayer worked from home during 2020 due to the COVID-19 pandemic or the taxpayer’s employer required the taxpayer to work from home.
- The taxpayer worked more than 50% of the time from home for a period of at least four consecutive weeks in 2020.
- Home office expenses were incurred directly by the taxpayer to work from home during this period.
- The taxpayer’s employer did not reimburse the taxpayer for all of the incurred home office expenses.

If all the above criteria are met, the taxpayer has the option to claim the temporary flat rate method for home office expenses by claiming \$2 per day for all days that were worked from home beyond March 16, to a maximum of 200 days. If the taxpayer wishes to claim this, please provide the name of the taxpayer and the amount of days worked from home due to the COVID-19 pandemic during 2020 below.

Name	Number of days worked from home

Did the taxpayer complete and sign Form T2200S or receive Form T2200 from their employer?  Yes  No

**If no, do not complete the following, please use the section above. Only complete the following section if you have a completed Form T2200S or Form T2200**

If yes, the taxpayer is eligible to claim the detailed method of home office expenses. If this is preferred over the temporary flat rate method, please provide the following:

Electricity, heat, water, home internet access fees	\$ _____
Maintenance (cleaning supplies, light bulbs, etc.)	\$ _____
Home insurance (commission employees only)	\$ _____
Property taxes (commission employees only)	\$ _____
Other expenses	\$ _____
Total expenses	\$ _____
Total square footage of home	_____
Home office square footage	_____

For a comprehensive list of eligible expenses, click here [Home Office Expenses](#)

### Section 9: What NOT to provide

To save you time when gathering information, please **do not submit** the following information unless requested:

- Duplicate medical receipts
- Personal bank and credit card statements
- Personal registered investments statements (RRSP, RESP, TFSA)
- We scan the information, so please do not staple documents or receipts – thank you!

**Additional comments:**

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