



Cawley • Curran • Wong & Associates  
Brian Cawley Corporation

**2017 PERSONAL INCOME TAX QUESTIONNAIRE**

Client Name: \_\_\_\_\_

Telephone: (     ) \_\_\_\_\_ Fax: (     ) \_\_\_\_\_ E-mail: \_\_\_\_\_

Please indicate your address if it has changed since the 2016 income tax return:

\_\_\_\_\_  
\_\_\_\_\_

\* Marital status (if changed in 2017, indicate date of change) \_\_\_\_\_

**I wish to receive my completed 2017 Tax Return and accompanying documents only by email in a PDF file (paperless option).**

**PLEASE CHECK ITEMS THAT YOU HAVE ATTACHED.**

**Income:**

- Employment - T4
- Employment insurance - T4E
- Business or Professional - Financial statements or T5013 (Limited Partnership) or attach details of your income and expense numbers.
- Old Age Security - T4A (OAS)
- Other pensions - T4A
- 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).
- T4A for RESP withdrawals.
- Dividends and interest - T5
- Universal child care benefits (Form RC62)
- Mutual funds, other Trust Income, Interest - Bank, Bonds - T3/T5/T600
- Limited partnerships - T5013
- Rental Property (attach details of income, expenses, purchases and sales)
- Alimony (provide copy of post-April 30, 1997 agreement or election, if not previously provided).

## Capital gains/losses

- Did you dispose of any capital properties (principal residence, shares) this year (attach copies of sales detail and original purchase documentation)?
- Allowable business investment losses (ie. Shareholder loans owing when the company is closed, investments that are worthless as the company has gone bankrupt etc.)
- Other income (e.g. stock options, gratuities, pensions, annuities, research grants and bursaries, lump-sum pension receipts, RRSPs - attach T4RSP, Workers' Compensation benefits).

## Deductions:

- Details of purchase of your first home after January 27, 2009 – First-Time Home Buyers' Tax Credit (HBTC).
- RRSP (attach receipts; also attach T10-Personal adjustment reversal, if you have received one).
- Annual union and professional dues (attach receipts).
- Child care expenses (attach receipts)
  - for live-in child care, include name and S.I.N.
  - for summer camps, indicate the number of weeks in residence.
- Provide T4 Summary and T4 slip where you have an employer account for a nanny.
- Receipts for child fitness tax credit.
- Attendant care (attach receipts).
- Adoption expenses.
- 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).
- Commission and employment expenses (detail and form T2200 or TL2).
- Carrying charges (interest on money borrowed to earn dividend and interest income, investment counselling fees, interest for limited partnerships, etc.).
- Other deductions and expenses (repayment of EI benefits, repayment of shareholder's loan, legal expenses to collect a retiring allowance or pension, legal expenses to appeal income tax assessments of previous years, etc.). Please attach all appropriate documentation and receipts.
- Federal and provincial political contributions (attach receipts).
- Charitable donations (attach receipts).
- Medical expenses (attach receipts) and details of private health insurance premiums.
- Tuition fees (attach T2202/T2202A including amounts which can be transferred from dependents).
- Interest paid on student loan (attach reporting slip).
- Details of public transit passes (include passes for your spouse and children under 19 at the end of the year). As of July 1, 2017, this amount has been eliminated.
- Labour sponsored funds – T5006.

**Wholly dependent children:**

- Please include name of child, address, relationship, birth date, S.I.N. and net income.
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**Additional personal exemptions:**

- If you are supporting other relatives who are living with you, provide the following information: name of relative, relationship, birth date, S.I. N. and net income.
  - Disability deduction (if first time, attach T2201 signed by physician)
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**Other**

- 2017 Tax Instalments paid (attach copy of your March 15, 2018 instalment form). Please photocopy both sides of each page as your total instalment information is detailed on the reverse side of one of the pages.
- Attach copy of 2016 Notice of Assessment (this confirms numbers filed in your 2016 income tax return). This documentation should be 2-3 pages.
- Attach details of RRSP Home Buyers' Plan withdrawals and /or Canada Revenue Agency's statement of account - Home Buyers' Plan, if received.