

# Steve Manias

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## 2017 PERSONAL INCOME TAX QUESTIONNAIRE

This questionnaire is designed to assist you in compiling the information necessary to prepare your 2017 personal tax return. Please attach this form to your documentation.

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

Telephone (\_\_\_\_)\_\_\_\_\_ Fax (\_\_\_\_)\_\_\_\_\_ Email \_\_\_\_\_

Please indicate address only if changed since 2016 income tax return:

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

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

**New family members:**

**Name:** \_\_\_\_\_

**Date of birth:** \_\_\_\_\_

**Date of adoption:** \_\_\_\_\_

## DIRECT DEPOSIT CHOICE AND BANKING INFORMATION

If you have already provided your banking information to us in previous years, there is no need to complete this section unless it had changed. However, if you have not already provided this information to us and would like to sign up for Direct Deposit, please provide your banking information as follows:

Branch number	Institution number	Account number
(5 digits)	(3 digits)	(maximum 12 digits)
<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Please check box if you would like a paper copy of your return ☐ YES ☐ NO  
Paper preparation cost of \$30 applies.

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

## 2017 T1 FOREIGN PROPERTY REPORTING

Canadian resident individuals who held certain property outside Canada with an aggregate cost of more than \$100,000 CAD, as well as any investment in “foreign affiliates” at any time during the tax year are subject to certain disclosure requirements to the Canada Revenue Agency (CRA).

Non-compliance with this reporting requirement results in severe penalties. To help us determine whether you are subject to the reporting rule, please read and consider each of the following questions carefully when answering them.

If you owned any of the following property at any time during 2017, answer YES to the relevant questions. You may be subject to the foreign property reporting rule, and we may prepare additional forms to submit to the CRA.

- |                              |                             |   |
|------------------------------|-----------------------------|---|
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Funds or intangible property (patents, copyrights, etc.) situated, deposited or held outside Canada   |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Tangible property situated outside of Canada  |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | A share of the capital stock of a non-resident corporation held by the taxpayer or by an agent on behalf of the taxpayer  |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | An interest in a non-resident trust that was acquired for consideration, other than an interest in a non-resident trust that is a foreign affiliate for the purposes of section 233.4 |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | An interest in a partnership that holds a Specified Foreign Property unless the partnership is required to file a T1135   |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | An interest in, or right with respect to, an entity that is a non-resident  |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | A property that is convertible into, exchangeable for, or confers a right to acquire a property that is Specified Foreign Property  |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | A debt owed by a non-resident, including government and corporate bonds, debentures, mortgages, and notes receivable  |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | An interest in a foreign insurance policy   |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Precious metals, gold certificates, and futures contracts held outside Canada   |

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

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

Please check items below as applicable:

**NOTE: Ensure ALL information slips are provided with your return. Canada Revenue Agency's (CRA's) process of matching information slips to tax returns is very accurate. In certain circumstances, unreported income can be penalized by up to 20% of the unreported amount(s).**

## INCOME

- ☐ Employment – T4
  - ☐ Old Age Security – T4A(OAS)
  - ☐ 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)
  - ☐ Employment Insurance – T4E
  - ☐ Universal Child Care Benefits – RC62
  - ☐ Interest, Dividends and other Investment Income – T5/T600
  - ☐ Mutual Funds and other Trust Income – T3
  - ☐ Limited Partnership – T5013
  - ☐ Partnership or joint venture income – Financial Statements or T5013
  - ☐ Business or Professional – Statement of income and expenses
  - ☐ Income from a profit-sharing plan
  - ☐ Income from Social Assistance
  - ☐ Rental Property (attach details of income, expenses, purchases and sales)
- 
- ☐ If assets have been purchased for use in the business, or loans incurred for business purposes, provide appropriate documents
- 
- ☐ Capital Gains/Losses
- 
- ☐ Did you dispose of any capital properties this year? (attach copies of sales detail and original purchase documentation.)
- 
- ☐ Alimony (provide copy of post-April 30, 1997, agreement or election, if changed or not previously provided)
- 
- ☐ Separation allowances or child maintenance
  - ☐ Pension income from foreign sources

**Client Name** \_\_\_\_\_

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

- ☐ Withdrawals or repayments under Home Buyers' Plan or Lifelong Learning Plan

## DEDUCTIONS

- ☐ Registered Retirement Savings Plan contributions (attach receipts)  
(attach T10 – Personal Adjustment Reversal, if you received one.)

- ☐ Annual union, professional dues (attach receipts)

- ☐ Child care expense (attach receipts):

- ☐ for individual child care providers, include S.I.N. and address

- ☐ for summer camps, indicate number of weeks in-residence

- ☐ Attendant care expenses (attach receipts)

- ☐ Allowable business investment losses (refer to Capital Gains/Losses above)

- ☐ 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, if changed or not previously provided)

- ☐ Commission and employment expenses (include details and T2200 or TL2)

- ☐ Carrying charges (interest on money borrowed to earn investment income, investment counsel fees, interest for limited partnerships)

- ☐ Other deductions and expenses (attach receipts)

- ☐ Federal and provincial political contributions (attach receipts)

- ☐ Charitable donations (attach receipts) (provide details of gifts in kind, e.g., securities)

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- ☐ Medical expenses (attach receipts) and details of private health insurance premiums, including amounts paid while travelling  
\_\_\_\_\_
- ☐ Disability deduction for you or dependant (if first-time claim, attach T2201 signed by physician)  
\_\_\_\_\_
- ☐ Adoption expenses  
\_\_\_\_\_
- ☐ Tuition fees (attach T2202/T2202A including amounts that can be transferred from dependants)  
\_\_\_\_\_
- ☐ Details of public transit passes (include passes for your spouse and children under 19 at the end of the year)  
\_\_\_\_\_
- ☐ Labour-sponsored funds – T5006
- ☐ Expenses qualifying for investment tax credits (e.g., film and video productions, resource expenditures re: mining or oil and gas)
- ☐ Interest paid on student loans (attach reporting slip)  
\_\_\_\_\_
- ☐ If you are a teacher or early childhood educator, provide a summary of eligible supplies to a maximum of \$1,000 in the calendar year.  
\_\_\_\_\_

For wholly dependent persons, please attach list and indicate for each dependant:

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

Address if different: \_\_\_\_\_

Relationship: \_\_\_\_\_

Birth date: \_\_\_\_\_

S.I.N.: \_\_\_\_\_

Net income: \_\_\_\_\_

Infirmary, if any: \_\_\_\_\_

## **OTHER**

- ☐ If you have sold your principal residence during 2017, provide copies of all documents concerning the sale.  
\_\_\_\_\_

- ☐ Attach all details of your tax-free savings account (TFSA)  
\_\_\_\_\_

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- ☐ 2018 Installments (attach February 2018 notice). Total remitted:  
\$ \_\_\_\_\_
- ☐ Attach copy of 2016 assessment notices and other correspondence from the Canada Revenue Agency  
\_\_\_\_\_
- ☐ Amount of any contributions to or distributions from, or loans to or from foreign trusts in 2017  
\_\_\_\_\_
- ☐ Indicate whether you wish to split pension income with spouse to reduce combined income tax:  
YES: \_\_\_\_\_  
NO: \_\_\_\_\_
- ☐ Indicate whether you are a U.S. citizen or Green Card holder:  
YES: \_\_\_\_\_  
NO: \_\_\_\_\_
- ☐ If you are a single taxpayer, indicate whether you wish to include the Universal Child Care Benefit (UCCB) in your income or whether you wish to include the UCCB in the income of one of the children for whom the UCCB has been paid.
- ☐ I wish to include the UCCB in the income of one of the children:  
YES: \_\_\_\_\_  
NO: \_\_\_\_\_

**COMMENTS**

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