

**2016 PERSONAL INCOME TAX QUESTIONNAIRE**

*This questionnaire is designed to assist you in compiling the information necessary to prepare your 2016 personal 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 2016?**  
 (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 2016 with an aggregate cost greater than \$100,000?** ☐ YES ☐ NO  
 (if yes provide details, this includes any real estate, deposits in foreign banks, shares in foreign corporations, etc.)

**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 \_\_\_\_\_ XXX \_\_\_\_\_  
**BRANCH NUMBER** **INSTITUTION NUMBER** **ACCOUNT NUMBER**

**Marital Status:** ☐ Single ☐ Married ☐ Separated ☐ Divorced ☐ Widowed ☐ Common-Law

**If changed in 2016, 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** \$ \_\_\_\_\_

**Amount of Universal Child Care Benefit (UCCB) included in spouse net income** \$ \_\_\_\_\_

**Amount of UCCB repayment included on spouse's 2016 tax return (line 213)** \$ \_\_\_\_\_

**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"/>
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"/>
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"/>
Public Transit	<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	<input type="checkbox"/>
Include GST/HST information if applicable	<input type="checkbox"/>
Did you employ an apprentice or co-op student during 2016?	<input type="checkbox"/> YES <input type="checkbox"/> NO
<i>Rental</i>	
Listing of rental property income and expenses	<input type="checkbox"/>
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"/>
Child fitness/art expenses (for children under 16, 18 if disabled)	<input type="checkbox"/>
Adoption related expenses	<input type="checkbox"/>

**OTHER INCOME/DEDUCTIONS con't****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)

☐

Listing of receipts for Ontario healthy homes tax credit

☐

Attendant care expenses

☐

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

☐*Dependants may include relatives in your care**Other*

Foreign Pensions

☐

Moving expenses (include distance moved to new employment)

☐

Interest paid on student loans

☐

Film and video production eligible for tax credit

☐

Canadian Exploration/Development Expenditures

☐

Business research and development

☐

Clergy residence deduction

T1223

☐

Other income/deductions not mentioned above

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☐**OTHER GENERAL ITEMS**

If this is the first time we are preparing your return, include a copy of your 2015 T1

☐

2015 Notice of assessment from CRA

☐

2016 Instalment payments (attach CRA statement)

\$ \_\_\_\_\_

☐

2016 Ontario Property Tax Bill

☐

2016 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 2016

☐

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

☐**COMMENTS**

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