PPL

PARKER PRINS LEBANO

Chartered Accountants
Professional Corporation

2014 PERSONAL INCOME TAX QUESTIONNAIRE

This questionnaire is designed to assist you in compiling the information necessary to prepare your 2014 personal tax return. Please return this form with your documentation.

Client Name ____

Telephone (___) ______________ Fax (___) ______________ E-mail ______________________

Please indicate address only if changed since 2013 income tax return ______________________

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Marital status (if changed in 2014, indicate change and date) ______________________

☐ If you are a PPL first-time client OR there are any changes for wholly-dependent persons, please attach list and indicate for each dependant: name, address if different, relationship, birth date, S.I.N., and net income. Note infirmity, if any.

Please check items that you have attached:

IMPORTANT FOR 2014

☐ ***Details of foreign property, other than personal use property, if aggregate cost is in excess of $100,000.*** The foreign reporting requirements have changed again for 2014 – if you are uncertain whether they apply to you, please let us know as soon as possible.

INCOME

☐ All T-Slips (ie. T4, T4A(OAS), T4A(P), T4E, T5, T3, etc.)

☐ Universal Child Care Benefits – RC62

☐ Interest, Dividends and other Investment Income – T5/T600

☐ Business or Professional – Financial Statements or T5013

☐ Rental Property (attach details of income, expenses, purchases and sales)

☐ Capital Gains/Losses (attached realized gain/loss report –**ask your broker if you have not received one**)

☐ 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)

☐ Other Income (e.g., stock options, annuities, scholarships, bursaries, research grants, RRSPs – attach T4RSP, Workers' Compensation benefits, foreign pension or investment income)

DEDUCTIONS

☐ Registered Retirement Savings Plan contributions for 2014 and the 1st 60 days of 2015 (attach receipts) (Attach T10 – Personal Adjustment Reversal, if you received one)

☐ Annual union, professional dues (attach receipts if not on T4 slip)

- ☐ Child care expense (attach receipts)
  (a) for individual providers, include S.I.N. and address ____
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  (b) for summer camps, indicate number of weeks that were in-residence ________________________
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- ☐ 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 dividend and interest, 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 donations of securities) ____
- ☐ Medical expenses (attach receipts) and details of private health insurance premiums, including amounts paid while travelling. To avoid duplication of claims and the retrieval of multiple receipts, **you may wish to obtain an annual summary from your service provider**
- ☐ Disability deduction for you or dependant (if first time claim, attach T2201 signed by physician)
- ☐ Adoption expenses
- ☐ Tuition and examination fees (attach signed T2202/T2202A including amounts that can be transferred from dependants. Please have the student sign the transfer portion of the form)
- ☐ Monthly public transit passes for the year (include passes for your spouse and children under 19 at the end of the year)
- ☐ Interest paid on student loans (attach reporting slip)
- ☐ Children’s fitness, recreational, and arts receipts for the year
- ☐ Receipts for home modifications if you are over age 65

OTHER

- ☐ 2014 Installments (attach February 2015 notice – total for 2014 is on the reverse).
  Total remitted: $_________________
- ☐ Attach copy of 2013 assessment notices and any seniors’ property grant notices
- ☐ Amount of any distributions or loans from foreign trusts received in 2014
- ☐ Property tax amount for 2014 or rent paid on primary residence

COMMENTS ____

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