

Income Tax Return Questionnaire for Individual Filers

What was your Marital Status as of December 31 of the tax year filing?

Yes No

Were you a Resident of Canada as of December 31 of the tax year?

Yes No

Was Ontario province of Residence at the End of the tax year?

Yes No

If applicable, Date of Move from One Province or Territory of Residence to Another?

Yes No

Is your home address the same as your mailing address?

Yes No

Did you enter Canada, became a resident of this country for income tax purposes, during tax year?

Yes No

Were you deemed non-resident in the tax year?

Yes No

Are you a member of a communal organization during the tax year?

Generally, a communal organization has members that live and work together, operates a business for the purpose of supporting its members, and its members do not own property in their own right as a matter of religious conviction. An example of a communal organization is a Hutterite colony.

Yes No

Is this taxpayer deceased?

Yes No

Do you have Canadian citizenship?

Yes No

Were you confined to a prison or a similar institution at any time during the tax year or during any of the 2 preceding years?

Yes No

Did you declare bankruptcy, or become discharged from bankruptcy, during the tax year?

Yes No

Did you have any dependants during tax year?

Yes No

Are you required to make a Home Buyers's; Plan (HBP) repayment for the tax year?

Yes No

Are you required to make a Lifelong Learning Plan (LLP) repayment for the tax year?

Yes No

Income Tax Return Questionnaire for Individual Filers

Did you receive a research grant during the tax year?

Yes No

Did you receive a housing allowance, and/or an amount for eligible utilities, as a member of the clergy?

Yes No

As an employee, did you receive a GST/HST rebate for employment expenses in tax year?

Yes No

Did you earn any income from an employer outside of Canada during the tax year?

Yes No

During the tax year, did you receive employment income from a corporation of which you control more than 40% of the voting shares, making you ineligible to participate in EI program?

Yes No

Did you receive any pension income from a foreign country in the tax year?

Yes No

Are you a status Indian that received tax-exempt income earned on a reserve during the tax year?

Yes No

Are you making Additional CPP or QPP Contributions?

- If you had more than 1 employer during the year, or you received other employment income that was not reported on a T4 slip, you may wish to make additional CPP or QPP contributions. Doing so may increase the pension you end up receiving later.
- You may also wish to make additional CPP or QPP contributions if you are a registered Indian, or a person entitled to be registered under the Indian Act, and you earned tax-exempt self-employment income on a reserve during the tax year.

Yes No

Did you receive any split income during the tax year?

Certain income you may have received, referred to as split income, is subject to special tax rules. A common type of split income is certain dividends and other income received from a business owned by a relative.

Yes No

Are you claiming Employee and Partner GST/HST Rebate?

You may be able to claim this rebate if you are claiming employment expenses, and your employer is a GST/HST registrant, other than a listed financial institution. Otherwise, you may be able to claim this rebate if you are a member of a GST/HST-registered partnership, and you have reported on your return your share of the income from that partnership.

Yes No