

## Income Tax Return Questionnaire for Individual Filers

Full Name:

SIN:

Address:

Date Of Birth:

Rent / Property Tax Paid:

Name of Landlord/Municipality:

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

**Did your marital status change during the tax year or any of the two preceding years?**

Yes      No

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

Yes      No      If New comer, please provide date of your arrival:

**Was Ontario Province of Residence at the End of the tax year?**

Yes      No

**What is the Move Date from One Province or Territory of Residence to Another if applicable?**

Yes      No

**Is your home address the same as your mailing address?**

Yes      No

**Did you enter Canada and become a country resident for income tax purposes during the tax year?**

Yes      No

**Were you deemed non-resident in the tax year?**

Yes      No

**Is this taxpayer deceased?**

Yes      No

**Do you have Canadian citizenship?**

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, operate a business to support 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

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

Yes      No

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

Yes      No

**Have you had medical expenses during the year?**

Yes No If yes, please provide the total for each category (dental, RMT, etc.).

**Have you made donations during the year to the Registered Charity or Political Party?**

Yes No If yes, provide names of the organizations and total contribution to each.

**Did you have any dependents during the tax year?**

Yes No

**Are you required to make a Home Buyer'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

**Did you receive a research grant during the tax year?**

Yes No

**Did you receive a housing allowance, &/or an amount for eligible utilities as a clergy member?**

Yes No

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

Yes No

**Did you earn any income from an employer outside 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 one employer during the year or received other employment income 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?**

Yes No