



ADL ACCOUNTING INC.

ACCURACY YOU CAN TRUST

Contact: +1 (604) 398-2040

Email: info@adlaccounting.ca

Personal Income Tax Client Questionnaire & Checklist

1. Personal Information:

- a. First Name: _____
- b. Last Name: _____
- c. SIN: _____
- d. Date of Birth (YYYY/MM/DD): _____
- e. Marital Status as of Dec 31 (Check which ever is applicable):
Single Married Common-Law Separated Divorced Widowed
- f. Address: _____
(please provide a government-issued photo ID)
- g. Contact Number: _____
- h. Email ID: _____

2. Spouse/ Common-Law Partner (if applicable):

- a. First Name: _____
- b. Last Name: _____
- c. SIN: _____
- d. Date of Birth (YYYY/MM/DD): _____
- e. Spouse Net Income (if known): _____

3. Dependants:

Name / SIN / Date of Birth / Relationship / Income (if any):

4. Changes during the year:

Did any of the following change during the year? (check if yes)

- Change of address
- Marriage Separation Divorce
- New dependant
- Immigration Emigration

5. Income Slips (please attach copies)

- T4- Employment income
- T4A- Other income
- T4E- Employment insurance
- T5- Investment income
- T3- Trust income
- T5008- Securities transactions
- T4RSP/ T4RIF- RRSP or RRIF withdrawals
- T4A(P)- CPP
- T4A(OAS)- Old age security
- Other income (please specify): _____

6. Investment & Capital Gains:

- a. Did you sell stocks, cryptocurrency or other investments during the year? (yes no)
- b. If yes, please provide trade statements.
Details: _____



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7. Rental Property:

- a. Rental property address: _____
- b. Total rental income: _____
- c. Expenses (property tax, insurance, interest on mortgage, utilities etc.):

8. Self-Employed/ Sole-Proprietorship/ Business:

- a. Business name: _____
- b. Business income: _____
- c. Business expenses: _____

9. RRSP Contributions:

- a. RRSP contributions (Mar to Dec): _____
- b. RRSP contributions (first 60 days of the year): _____

10. Deductions:

- Childcare expenses
- Union or professional dues
- Moving expenses
- Support payments

11. Tax Credits:

- Medical expenses
- Tuition (T2202)
- Charitable donations
- Disability tax credit
- First-time home buyer
- Details: _____

12. Foreign Assets:

- a. Did you own foreign assets exceeding \$100,000.00 (CAD) at any time during the year? (yes no)
- b. If yes, provide details for T1135 reporting.

13. Real Estate:

- a. Did you buy or sell any real estate during the year? (yes no)
- b. Property address: _____
- c. Purchase or sale date: _____

14. CRA Instalments:

- a. Did you make any instalment payments to CRA? (yes no)
- b. Total instalments paid: _____

15. BC Renters' Tax Credit (Important for BC Residents):

- a. The BC Renters' Tax Credit provides up to \$400.00 annually to eligible renters.
- b. To claim the credit, please provide:
 - i) Total rent paid during the year: _____
 - ii) Landlord's name: _____
 - iii) Landlord's address: _____
 - iv) Rental property address: _____

16. Client Declaration:

- a. Client Name: _____
- b. Signature: _____
- c. Date (YYYY/MM/DD): _____