Tax Questionnaire

1. Provide full names, DOB, and SIN for yourself, partner (specify marital status) and any dependants, as well as your phone numbers, home and mailing address(es).
2. Provide all relevant slips and receipts, in pdf or jpeg format.
3. Have yours *(and spouse’s)* Notice of Assessment for last tax year handy. I will need this info:
   1. NETFILE Access code, located on right side of NOA.
   2. RRSP contribution room.
4. Please answer these questions for you *(and spouse if applicable)* about 2022:
   1. What province did you live in as of December 31?
   2. If you moved, what date was it? If it was for work let me know as you may be entitled to claim moving costs.
   3. Did you become a resident of Canada for tax purposes?
   4. Did your marital status change?
   5. Did you have any foreign property worth more than $100,000? What about foreign income?
   6. Did you sell your principal residence?
   7. Is this your first tax return?
   8. Would you like your info provided to Elections Canada to register you as a voter?
   9. Are you registered under the *Indian Act*?
   10. Did you spend 90 days or more in prison?
   11. Will you be claiming the climate action incentive? *(province dependent - similar to GST rebate)*
   12. There may also be additional incentives/credits available by province - I will let you know if this is the case.
5. Are you registered for CRA MyAccount? Do you want any future correspondence, such as NOA, through MyAccount? Is your Direct Deposit information up to date?
6. Did you work from home this year? How many days? Do you have a T2200S form from your employer? You can claim work-from-home without a form regardless.
7. Let me know if any of the following apply:
   1. Disability (including attendant care)
   2. Childcare
   3. Alimony/child support
8. Tell me about your income including:
   1. Capital gains/losses (properties and stocks, investment fees) outside of an RRSP or TFSA
   2. Bursaries/scholarships/tuition fees/training fees
   3. Rental property (please include all relevant receipts; for a list of claimable items click here: [Rental expenses you can deduct - Canada.ca](https://www.canada.ca/en/revenue-agency/services/tax/businesses/topics/rental-income/completing-form-t776-statement-real-estate-rentals/rental-expenses-you-deduct.html) )
9. Do the following credits/deductions apply?
   1. RRSPs (including Home Buyers’ Plan or Lifelong Learning Plan if applicable)
   2. Annual union/professional dues
   3. Political contributions
   4. Charitable donations
   5. Home buyers’ credit
   6. Medical expenses
   7. Educator school supplies tax credit
   8. Rent paid
10. Anything else you think I should know!