

Nyrose McKenzie Alexander LLP

CHARTERED PROFESSIONAL ACCOUNTANTS

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2017 New Client Questionnaire

Date: _____ Client # _____

Name(s): _____ SIN: _____ Birth Date: _____

Name(s): _____ SIN: _____ Birth Date: _____

Address: _____ Home / Cell Telephone #: _____

Work Telephone#: _____

Email Address: _____

Marital Status: _____; Changed during the tax year (y/n): _____; Date of change: _____

Children:

Name: _____ SIN: _____ Birth Date: _____

Name: _____ SIN: _____ Birth Date: _____

Name: _____ SIN: _____ Birth Date: _____

Self Employment Income: Y or N

GST Return to File: Y or N

GST #: _____

Are you a Canadian Citizen?

<u>Taxpayer</u>	<u>Spouse</u>
Y or N	Y or N

Are you a US Citizen?

Y or N	Y or N
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Do you wish to provide information to Elections Canada?

Y or N	Y or N
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(Information provided includes only name, address and date of birth)

Do you own foreign property, at any time in 2017, with a total cost of more than \$100,000 Canadian? (Property earning income, ie. rental, interest or Dividends)

Y or N	Y or N
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_____ Did you sell your principal residence in 2017. (All house sales must now be recorded on your tax return)

Information still to come: Y / N What info: _____ Please forward to: _____

DIRECT DEPOSIT

Have you provided CRA with your banking information to receive tax refunds? Y or N

Please advise if you have a different account than prior years

If No: Branch #: _____ Institution #: _____ Account #: _____

* Please note that payment is due upon completion of the tax return unless prior arrangement has been made with management. We now also accept VISA, Mastercard, and Debit card, as well as cheque.

Please fill out back

TO ALL CLIENTS

Canada Revenue Agency enforces significant penalties on unreported income. As a taxpayer, the onus is on you to ensure all slips and other sources of income have been provided to us, and included on your tax return.

Initial: _____

Please check if any of the following apply:

SLIPS

- T4 Slips
- T4A Slips
- Other pensions and annuities
- T4E Employment Insurance benefits
- T4A Pension and annuity income
- T4A(P) Canada Pension Plan Benefits
- T4(OAS)Old age securitypension/foreign pension
- T4A(RCA)Retirement compensation arrangements
- T5007 Social Assistance payments
- Workers Compensation Benefits
- Universal Child Care Benefits (RC62)
- T4RSP Registered retirement savings plan income
- T4RIF Registered retirement income fund income
- T3 Income from trust allocations
- T5 Investment Income
- T5013/T5013A Partnership Income
- T5008 Income from securities transactions

OTHER INCOME

- Business/Self Employment Income
- Rental Income
- Farming Income
- Commission Income
- Income on Foreign Property or investments
- Copy of US return (if filed) and IRS transcript or proof of payment**
(use form 4506T to request transcript)
- Alimony, separation allowances, support payments
- Interest
- Scholarship, fellowships bursaries
- Capital Gains/Losses

EXPENSES

- Child Care Expenses (attach receipts)
- RRSP Contributions (attach receipts)
- Tuition fees (T2202, TL11A, TL11D)
- Medical Expenses (attach receipts)
- Attendant care expenses
- Moving expenses
- Investment management fees
- Pension plan contributions
- Charitable Donations
- Eligible educator expenses (receipts for supplies)
- Annual Union, professional dues
- Interest on money borrowed to purchase investments
- Employment related expenses (T2200 or TL2 Required)
- Business expenses (vehicles, supplies, office etc)
- Alimony, separation allowances, child maintenance
- Eligible Fitness Expenses (provide proper receipts)
- Eligible childrens art expenses (provide proper receipts)
- Public transit fees (include receipts or passes)
- Disability deduction(form T2201)
- Home Accessibility expenses

OTHER

- Home Buyers' plans withdrawals
- Political contributions
- Notice of Assessment (last year) included
- New clients(Prior 2 years tax returns)
- Life Long Learning Plan repayment
- Installments paid to CRA
- Details of foreign property owned, including foreign based stocks

Does your business have a website? Y or N

Did your business earn income from a website in 2017? Y or N How much earned: _____

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