

# CRIMSON ENTERPRISES

## 2021 T1 Client Tax Questionnaire

Each individual must complete this form. If more room is needed, please use the back of the form.

1. Name: First \_\_\_\_\_ Last \_\_\_\_\_ Initial \_\_\_\_\_
2. Is this your first return?
3. Has your name changed since your last return?
4. SIN: \_\_\_\_\_
5. Date of birth: (YY/MM/DD): \_\_\_\_\_
6. Have you changed your address since your last return?  
  If YES, does CRA have your new address on file?  
(You phoned them or updated it through your "MyAccount")
7. New address for our records:  
Care of: \_\_\_\_\_  
Address: \_\_\_\_\_  
City \_\_\_\_\_ Prov \_\_\_\_\_ Postal Code \_\_\_\_\_
8. Phone number: Home \_\_\_\_\_ Cell \_\_\_\_\_ Work \_\_\_\_\_
9. Province (Territory) of residence on Dec 31, 2021: \_\_\_\_\_
10. Province (Territory) where you **currently** reside if it is **NOT** the same as above: \_\_\_\_\_
11. If you were self employed in 2021, enter Province (Territory) of self employment: \_\_\_\_\_
12. If you **became** or **ceased** to be a resident of Canada in 2021, give the date of:  
**Entry** (month-day) \_\_\_\_\_ or, **departure** (month-day) \_\_\_\_\_
13. Marital Status on Dec 31, 2021:  
 Married  Common-law  Widowed  Divorced  Separated  Single
14. Did your marital status change in 2021?  
If YES, what was it previously? \_\_\_\_\_ Date of change (month/day): \_\_\_\_\_
15. If married or common-law, please provide partner's information:  
Name: First \_\_\_\_\_ Last \_\_\_\_\_ Initial \_\_\_\_\_  
SIN: \_\_\_\_\_ Date of birth (YY/MM/DD): \_\_\_\_\_  
  Is your spouse or partner non-resident?  
  Is your spouse or partner self-employed?  
  Do you wish to create a linked spousal return (if your spouse's taxing province is BC)?  
  If YES, do you authorize us to split your pension/RRIF with your spouse, if advantageous?  
**If you do not wish to create a linked return, please provide the following details about your spouse's return:**  
His/her net income for 2021 (line 23600): \_\_\_\_\_  
Amount of UCCB benefit (line 11700): \_\_\_\_\_  
Amount of UCCB repayment (line 21300): \_\_\_\_\_
16. If this return is for a deceased person, please provide date of death (YY/MM/DD): \_\_\_\_\_
17. Is this a pre-bankruptcy return?  
Date of bankruptcy (YY/MM/DD): \_\_\_\_\_  
Amount of income after bankruptcy: \_\_\_\_\_
18. Did you reside within Nisga'a Lands on December 31, 2021?  
  If YES, are you a citizen of the Nisga'a Nation?

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19. Language of correspondence: *English or Français*
20. Did you own or hold **foreign property at any time** in 2021 with a total cost of more than CA\$100,000?
21. Are you a Canadian citizen?  
  If YES, do you authorize CRA to give your name, address, date of birth and citizenship to Elections Canada for the National Register of Electors?
22. Do you have income in 2021 that is exempt under the Indian Act?  
If YES, we will let you know what additional information we require to complete form T90.
23. Do you have RRSP contribution receipts dated from Mar 2 to Dec 31, 2021 or Jan 1 to Mar 1, 2022?
24. Did you make quarterly income tax instalment prepayments in 2021?  
If YES, how much? \_\_\_\_\_ (Provide receipts or CRA notice of payments)
25. Do you qualify for any of the following tax credits? You must provide receipts. (Mark all that apply)
- Medical Tax Credits and Disability Tax Credit (**must have a completed CRA form T2201**)
  - First-Time Home Buyer's Tax Credit (FTHBTC) or Home Buyer's Plan (HBP/RRSP)
  - Donations **and/or** Moving Expenses
  - Tuition and Education amounts (**must have form T2202 from the school**)
  - Employment Expense Deduction - if you had to buy your own tools, drive your own vehicle between work locations, buy gas for a company vehicle or were required to use your cell phone for work.  
(**must have receipts/mileage and completed form T2200 - Declaration of Conditions of Employment**)
26. Do you have children under 18 years of age (at Dec 31, 2021) living with you? If YES, please provide name, date of birth and SIN (if applicable).
27. Did you support any relative over the age of 18 during the year, who was disabled and wholly or partially dependant on you? If YES, please provide name, date of birth and SIN (if applicable).
28. Did you sell any shares, bonds, mutual funds or other investments? (Not through a financial advisor)
29. Did you pay for any **medical insurance** other than MSP (eg. extended health, dental, travel, etc) other than any amounts shown on a T4slip? **See "common deductions" on page 3.** If YES, please provide receipts.
30. **Foreign Pensions:** Do you have income from foreign pensions? If YES, which country? \_\_\_\_\_
31. Did you sell your principal residence in 2021?  
If YES, please provide year originally purchased, complete address & postal code of the residence and the net proceeds of sale.
32. Did you pay for any qualifying Home Accessibility Expenses in 2021? If unsure, please ask us.
33. Are you an eligible educator claiming the school supply tax credit? If YES, please provide receipts.
34. Did you pay for any Digital News Subscriptions whose content is primarily original news and does NOT hold a broadcast licence? If YES, please provide receipts.
35. Have you provided us with your CRA T1 Notice of Assessment (NOA) from 2020?  
(If we processed your 2020 tax return then we already have your NOA on file)
36. Do you authorize us to exchange information with CRA and/or use our office as your mailing address?

*My signature on the Tax Return or the T183 confirms that the terms, nature and scope of the engagement has been met, and further that, to the best of my knowledge, all the information disclosed in this questionnaire is complete and accurate. I authorize you to e-file my T1 Income Tax Return.*

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

Email address: \_\_\_\_\_

**CRIMSON  
ENTERPRISES**  
**2021 T1 Client Tax Questionnaire**

*Each individual must complete this form. If more room is needed, please use the back of the form.*

***New for 2020, 2021 & 2022***

Simplified process for claiming a deduction for home office expenses for employees working from home due to COVID-19.

The new temporary flat rate method simplifies your claim for home office expenses. You are eligible to use this new method if you worked more than 50% of the time from home for a period of at least four consecutive weeks in 2021 due to the COVID-19 pandemic. You can claim \$2 for each day you worked from home during that period plus any additional days you worked at home in 2021 due to the COVID-19 pandemic. The maximum you can claim using the new temporary flat rate method is \$400 (200 working days) per individual in 2020 and \$500 (250 working days) in 2021 and 2022. This method can only be used for the 2020, 2021 and 2022 tax years.

Each individual working from home who meets the eligibility criteria (see below) can use the temporary flat rate method to calculate their deduction for home office expenses. This means multiple people working from the same home can each make a claim.

This expense claim can only be used for the 2020, 2021 and 2022 tax years.

***Eligibility Criteria***

- You worked from home in 2021 due to the COVID-19 pandemic
- You worked more than 50% of the time from home for a period of at least four consecutive weeks
- You are only claiming home office expenses and are not claiming any other employment expenses
- Your employer did not reimburse you for all of your home office expenses

If you are eligible to claim this flat rate home office expense please indicate the number of days that qualify:

No. of days:

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### Common Tax Paperwork - please check all that you are including

#### Income Slips

- T3 Statement of trust income, allocation and designation
- T4 Statement of remuneration paid
- T4A Statement of pensions, retirement, annuity and other income
- T4E Statement of employment insurance and other benefits
- T4F Statement of fishing income
- T4RSP Statement of RRSP income
- T4RIF Statement of income from a registered retirement income fund
- T4PS Statement of employee profit sharing plan
- T4A(OAS) Statement of Old Age Security pension
- T4A(P) Statement of Canadian Pension Plan benefits
- T5 Statement of investment income (includes bank interest)
- T5007 Statement of benefits
- T5008 Statement of securities transactions
- T5013 Statement of partnership income
  
- Foreign pension amounts
- Other income with no slips (Example: Tips, Casual labour, Elections Canada or Elections BC employment). **Please specify and indicate amounts.**

#### Common deductions:

- RRSP/HBP/LLP
- Tuition (Form T2202)
- Charitable donations
- Dependants
- Childcare expenses
- Political contributions
- Moving expenses
- Rental expenses - property insurance, mortgage interest, property tax, repairs, strata fees
- Medical expenses (example: extended health insurance, medical travel insurance, prescriptions, dental, optometry, chiropractic, physiotherapy, massage therapy, ambulance, crutches, prescription eyeglasses and contacts).  
*Note that over-the-counter remedies are not valid medical expenses, except vitamin B12.*
- Union dues, with receipt from the union