

# CRIMSON ENTERPRISES

## 2017 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 (if CRA does not have your current address):  
Care of: \_\_\_\_\_  
Address: \_\_\_\_\_  
City \_\_\_\_\_ Prov \_\_\_\_\_ Postal Code \_\_\_\_\_
8. Phone number: Home/Cell \_\_\_\_\_ Work \_\_\_\_\_ Ext \_\_\_\_\_
9. Province (Territory) of residence on Dec 31, 2017: \_\_\_\_\_
10. Province (Territory) where you **currently** reside if it is not the same as above: \_\_\_\_\_
11. If you were self employed in 2017, enter Province (Territory) of self employment: \_\_\_\_\_
12. If you **became** or **ceased** to be a **resident of Canada in 2017**, give the date of:  
**Entry** (month-day) \_\_\_\_\_ or, **departure** (month-day) \_\_\_\_\_
13. Marital Status on Dec 31, 2017:  
 Married  Common-law  Widowed  Divorced  Separated  Single
14. Did your marital status change in 2017?  
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 2017 (line 236): \_\_\_\_\_  
Amount of UCCB benefit (line 117): \_\_\_\_\_  
Amount of UCCB repayment (line 213): \_\_\_\_\_
16. If this return is for a deceased person, please provide date of death (YY/MM/DD): \_\_\_\_\_
17. Is this return for a pre-bankruptcy return?  
Date of bankruptcy (YY/MM/DD): \_\_\_\_\_  
Amount of income after bankruptcy: \_\_\_\_\_

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18. Did you reside within Nisga'a Lands on December 31, 2017?  
  If YES, are you a citizen of the Nisga'a Nation?
19. Language of correspondence:  English  Français
20. Did you own or hold **foreign property at any time** in 2017 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 RRSP contribution receipts dated from March 1, 2017 to March 1, 2018?
23. Did you make quarterly income tax instalment prepayments in 2017?  
If YES, how much? \_\_\_\_\_ (Provide receipts or CRA notice of payments)
24. 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 completed CRA form T2201)
  - First-Time Home Buyer's Tax Credit (FTHBTC)
  - Home Buyer's Plan (HBP/RRSP)
  - Public Transit Amount (transit pass) - January 1 - June 30, 2017 only
  - Donations
  - Moving Expenses
  - Tuition and Education amounts (must have form T2202A from the school)
  - Employment Expense Deduction (must have completed form T2200 - Declaration of Conditions of Employment)
25. Do you have children under 18 years of age (at Dec 31) living with you? If YES, please provide name, date of birth and SIN (if applicable).
26. 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).
27. Did you **dispose of any** shares, bonds, mutual funds, trust units or other investments? (not RRSP/RRIF)
28. Did you pay for any **medical insurance** other than MSP (eg. extended health, dental, travel, etc)?  
If YES, please provide receipts.
29. **Foreign Pensions:** Do you have income from foreign pensions? If YES, which country? \_\_\_\_\_
30. Did you sell your principal residence in 2017?  
If YES, please provide year originally purchased, complete address & postal code of the residence and the proceeds of disposition.
31. Did you pay for any qualifying Home Accessibility Expenses in 2017? If unsure, please ask us.
32. Are you an eligible educator claiming the school supply tax credit? If YES, please provide receipts.
33. Do we have on file or have you provided us with your CRA T1 Notice of Assessment from **2016**?
34. 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 the Tax Return is complete and accurate. I authorize you to e-file my T1 Income Tax return.*

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

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

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

#### Income Slips

- RC62 Universal child care benefit statement
- 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
- Dependents
- Childcare expenses
- Political contributions
- Moving expenses
- Medical expenses (example: extended health insurance, travel insurance, prescriptions, dental, chiropractic, physiotherapy, massage therapy). Note that over-the-counter remedies are not valid medical expenses.
- Union dues, with receipt from the union