

2009 PERSONAL INCOME TAX QUESTIONNAIRE

This questionnaire is designed to assist you in compiling the information necessary for us to prepare your 2009 personal tax return.

Please return this form to your Sloan Tax Professional with your documentation.

Client Name

Telephone () _____ Fax () _____ E-mail _____

Please indicate address only if changed since 2008 income tax return

Marital status (if changed in 2009, indicate change and date)

Please check items that you have attached:

INCOME

- Employment – T4
- Old Age Security – T4A(OAS)
- Canada Pension Plan benefits – T4A(P)
- Other Pensions – T4A
- Employment Insurance – T4E
- Interest, Dividends and other Investment Income – T5/T600
- Mutual Funds and other Trust Income – T3
- Limited Partnership – T5013
- Business or Professional – Financial Statements or T5013
- Rental Property (attach details of income, expenses, purchases and sales)
- Capital Gains/Losses

Did you dispose of any capital properties this year?

(Attach copies of sales detail and original purchase documentation.)

- Alimony (provide copy of post-April 30, 1997 agreement or election, if changed or not previously provided)
- Other Income (e.g., stock options, annuities, scholarships, bursaries, research grants, RRSPs – attach T4RSP, Workers' Compensation benefits).

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Client Name

DEDUCTIONS

- Registered Retirement Savings Plan contributions (attach receipts)
- Annual union, professional dues (attach receipts)
- Child care expense (attach receipts)

(a) for individual providers, include S.I.N. and address

(b) for summer camps, indicate number of weeks that were in-residence

- Attendant care expenses (attach receipts)
 - Allowable business investment losses (refer to Capital Gains/Losses above)
 - Moving expenses (attach receipts). Indicate distance moved to new employment
 - Alimony or separation allowances paid (include name(s) and address(es) of recipients; attach copy of agreement or court order for spousal support which was signed on or after May 1, 1997 or election, if changed or not previously provided)
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- Commission and employment expenses (include details and T2200 or TL2)
- Carrying charges (interest on money borrowed to earn dividend and interest, investment counsel fees, interest for limited partnerships, safety deposit box)
- Other deductions and expenses (attach receipts)
- Federal and provincial political contributions (attach receipts)
- Charitable donations (attach receipts)
- Medical expenses (attach receipts) and details of private health insurance premiums, including amounts paid while travelling (for dependants over age 18, up to \$10,000 can be transferred)
- Disability deduction for you or dependant (if first time claim, attach T2201 signed by physician)
- Adoption expenses (allowable since 2005)
- Tuition fees (attach T2202/T2202A including amounts that can be transferred from dependants)
- Labour-sponsored funds – T5006
- Interest paid on student loans (attach reporting slip)
- For wholly-dependent persons, please attach list and indicate for each dependant: name, address if different, relationship, birth date, S.I.N., and net income. Note infirmity, if any.

OTHER

- Home renovation tax credit** (new for 2009) *Schedule 12 attached*
- 2009 Instalments (attach February 2010 notice). Total remitted: \$ _____
- Attach copy of 2007 and 2008 assessment notices
- Attach details of RRSP – Home Buyers' Plan or Lifelong Learning Plan withdrawals and/or the Canada Revenue Agency's Statement of Account concerning these plans, if received
- Amount of any distributions or loans from foreign trusts received in 2009
- Details of foreign property, other than personal use property, if aggregate cost is in excess of \$100,000.

COMMENTS

Complete this schedule if you had eligible home renovation expenses and you are claiming the Home Renovation Tax Credit (HRTC). For more information, see line 368 in the guide.

Eligible expenses are those incurred after January 27, 2009 and before February 1, 2010, under an agreement entered into after January 27, 2009, for work performed or goods acquired in respect of an eligible dwelling.

Attach a copy of this schedule to your return. Do not include receipts, but keep them in case we ask to see them.

Note: Attach a separate sheet of paper if you need more space.

Date on sales slip or contract	Supplier or Contractor		Description (indicate if labour is included)	Amount paid (including all applicable taxes)		
	Name	GST/HST No. (if applicable)				
				+		
				+		
				+		
				+		
				+		
				+		
				+		
				+		
				+		
				+		
				+		
				+		
				+		
				+		
				+		
				+		
Total eligible expenses				=		1
Portion of expenses incurred and related to rental and/or business use, if any				-		2
Line 1 minus line 2 (maximum \$10,000)				=		3
Base amount				-	1,000 00	4
Line 3 minus line 4 (if negative, enter "0")				=		5
Amount claimed on line 368 of Schedule 1 by other eligible family members (see line 368 in the guide)				-		6
Line 5 minus line 6 (if negative, enter "0") Enter this amount on line 368 of your Schedule 1.				=		7
Home renovation expenses				=		