

Dewar McCarthy & Company

Head office: 2769 Shawnigan Lake Road
Shawnigan Lake BC
V0R 2W2 Canada
Victoria office: Douglas Professional Centre
Unit 550 - 2950 Douglas Street
(Off Burnside Road) Victoria BC
V8T 4N4

Tel: 1.250.483.4739
Fax: 1.250.483.5888
tax@dewarmccarthy.com

TAXATION YEAR: 2012

PERSONAL TAX QUESTIONNAIRE

Client Information

Name: _____ Telephone: _____

Address: _____ Mailing Address: _____

SIN: _____ Date of birth: _____

Email: _____ Cell: _____

Province of Residence at December 31: _____

Self Employed: Yes/No Province of Self Employment: _____

Residency

Did you become or cease to be a Canadian Resident in this tax year? Yes/No

Date of entry to Canada: _____ Date of Departure from Canada: _____

Marital Status

Marital Status at December 31st of Taxation Year

Single Married Common Law Separated Divorced Windowed

If status changed during the tax year, enter date of change: _____

Is this Tax Return being prepared for someone deceased? Yes / No Date Deceased: _____

Spouse/Partner Information

Spouse Name: _____ Spouse SIN: _____

Spouse Date of Birth: _____ Telephone Number: _____

Spouse Net Income: _____

Dependents Information

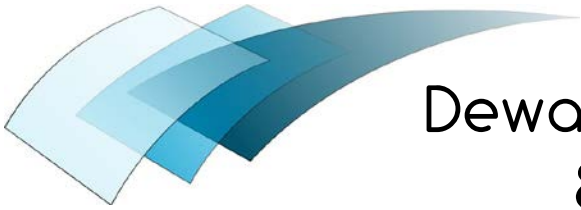
Name: _____ DOB: _____ Relationship: _____ SIN: _____ Income: _____

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Are you or any of your dependants permanently disabled? Yes / No

If yes has a T2201 (Disability Tax Credit Certificate) been Filed? Yes / No



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Personal Tax Information

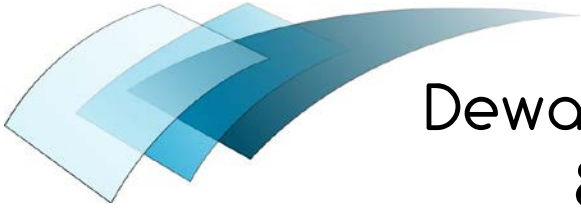
Are you a Canadian Citizen?	Yes / No
Has your name changed in this taxation year?	Yes/No
Are you a first time tax filer?	Yes/No
Did you own property outside of Canada over \$100,000.00?	Yes / No
Is your child transferring post-secondary tuition amount to you?	Yes / No
Did you make Tax Instalment Payments during the year? Amounts?	Yes / No
Did you participate in the Home Buyer Plan? Date started: _____ Amount _____	Yes / No
Did you participate in the Lifelong Learning Plane? Date started: _____ Amount _____	Yes / No
Are you including last years Notice of Assessment?	Yes / No
New Clients – are you including your last year tax return and schedules?	Yes / No
Do you want to be contacted by Elections Canada?	Yes/No
Did the taxpayer receive Pension income?	Yes/No
If “Yes” is the taxpayer eligible to split pension income with spouse/partner?	Yes/No
Were you confined to a prison or similar institution for a period of 90 days or more in 2010	Yes/No

REFUNDS

Would you like revenue Canada to direct deposit to your account or do you want a cheque? Direct/Cheque

Bank details required (if you want direct deposit)

Branch # 5 digits: _____ **Institution #** 3 digits: _____ **Account #** Max 12 digits _____



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Commission Employees (if applicable)

Do you have a signed Form T2200 – Declaration of Conditions of Employment --- Use the Employment Checklist

Is there an amount in Box 42 of your T4 Slip? Yes / No

Did you under your employment Contract have to pay your own expenses? Yes / No

Did you receive an allowance for expenses? Amount Yes / No

If yes, is the allowance received included in your income? Yes / No

The Canadian Revenue agency **does not** allow you to deduct the cost of travel to and from work, or other expenses, such as most tools and clothing.

Allowable Expenses for Qualified Employees

Accounting & Legal Fees

Annual License fees

Advertising, promotion, gifts