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## 2022 PERSONAL INCOME TAX QUESTIONNAIRE

*This questionnaire is designed to assist you in compiling the information necessary to prepare your 2022 personal tax return. Please attach this form to your documentation.*

Client Name \_\_\_\_\_

Cell (\_\_\_\_) \_\_\_\_\_ Home (\_\_\_\_) \_\_\_\_\_ Email \_\_\_\_\_

Please indicate address **only** if changed since 2021 income tax return:

\_\_\_\_\_  
 \_\_\_\_\_

Marital status (if changed in 2022, indicate change and date) \_\_\_\_\_

New family members:

Name: \_\_\_\_\_

Date of birth: \_\_\_\_\_

<i>These questions are on the personal income tax form. Please answer the following questions on behalf of each member of your family:</i>	YES	NO
<b>1) Did you sell your home or vacation property during the year?</b> If yes, please provide legal address, proceeds and year of acquisition. Failure to disclose the sale of your home or vacation property could result in large tax penalties. CRA now requires this sale to be reported even if no tax is payable.		
<b>2) Are all family members set up for direct deposit?</b> If yes, has CRA been notified of the most up-to-date bank account information? If no, this can be done by phone (call 1-800-959-8281), online or by mail by completing the Canada direct deposit enrolment form and mailing it to the address on the form.		
<b>3) Are you a Canadian Citizen?</b> If you are a U.S. citizen, dual citizen or green card holder, you have a U.S. tax filing obligation. Please contact us for further information.		
<b>4) As a Canadian Citizen, do you authorize CRA to provide your name, address, date of birth and citizenship to Elections Canada for the National Registry of Electors?</b>		
<b>5) Did you own or hold foreign property at any time in 2022 with a total cost of more than CAN \$100,000?</b> Foreign property includes stocks, bonds and income producing property. It does not include foreign investments held through Canadian mutual funds or personal use properties.		

Client Name \_\_\_\_\_

If yes, then Form T1135 or Form T1142 must be completed, signed and filed with Canada Revenue Agency on or before the T1 due date, or penalties will apply. Penalties can reach \$2,500 for each year.		
<b>6) Did you earn any income or realize any gains from foreign property in 2022?</b>		
<b>7) At any time in 2022, did you receive funds or property from, or were you indebted to a non-resident trust in which you were beneficially interested?</b> If yes, the Form T1142 must be completed, signed and filed with Canada Revenue Agency on or before the T1 due date, or penalties will apply. Penalties can reach \$2,500 for each year.	<b>YES</b>	<b>NO</b>
<b>8) Were you required to work from home due to Covid-19 and wish to claim the work space in home expense deduction?</b> Please advise us whether you would like to make the claim under the detailed method or the flat rate method (\$2/day up to a maximum of \$500). If you wish to make a claim using the detailed method, you should reach out to your employer to ensure you get a signed T2200S (this is required to make a claim using the detailed method). In addition, all supporting invoices should be kept to support the claim under the detailed method. To make a claim on your 2021 tax return, please complete <a href="#">Form T777S</a> summarizing the home office expenses you incurred during the year. If you would like to make a claim using the temporary flat rate method, please advise us of the number of working days you worked from home due to the Covid-19.	<u>Select:</u> Detail Method (____) or Flat Rate (____)	

Print Name \_\_\_\_\_ Date \_\_\_\_\_

Signature \_\_\_\_\_

**Please check items attached:**

**NOTE: Ensure ALL information slips are provided with your return. Canada Revenue Agency's (CRA's) process of matching information slips to tax returns is very accurate. In certain circumstances, unreported income can be penalized by up to 20% of the unreported amount(s).**

**INCOME**

- T4 - Employment, Retiring Allowance
- T4A(OAS) Old Age Security, T4A(P) Canada Pension Plan, T4E Employment Insurance
- T4A - Pensions, Registered Education Savings Plan income, CERB, etc.
- T5/T600 - Interest, Dividends and other Investment Income
- T3 - Mutual Funds and other Trust Income
- T5013 - Limited Partnership
- Business or Professional – Summary of income and expenses.
- Do you earn income from website/webpages?
- Rental Property Income (if applicable, attach details of property purchases and sales).
- Capital Gains/Losses - Did you dispose of any capital properties this year? Please provide your gain/ loss summary for stock transactions. Attach copies of sales details and original purchase documentation for real estate transactions.

- Alimony received (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, T4RIF, Workers' Compensation benefits).
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## DEDUCTIONS

- T2200, T2200S, T777S, TL2) - Commission and employment expenses (include details and Note: Include cost of tools.
- RRSP - Registered Retirement Savings Plan contributions (attach receipts.
- Registered Retirement Savings Plan withdrawals under the Home Buyer Plan or the Lifelong Learning Plan (or CRA's statement of account concerning these plans if received)
- Annual union, professional dues (attach receipts)
- Child care expense (attach receipts)
  - (a) for individual providers, include S.I.N. and address
  - (b) for overnight 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). Did you move 40km closer to a new work location?
- Alimony or separation allowances paid (include name(s) and address(es) of recipient(s); attach copy of agreement or court order for spousal support which was signed on or after May 1, 1997 or election).
- Carrying charges (investment counsel fees, interest on money borrowed to earn dividends and interest, interest for limited partnerships)
- Federal and provincial political contributions (attach receipts)
- Charitable donations (attach receipts). Note: Identify donations of securities for special tax relief.
- Medical expenses (attach receipts) and details of private health insurance premiums, including amounts paid while traveling (**NOTE: Your pharmacy will provide you with a summary of all prescriptions for your family for the year).**
- Disability deduction for you or dependant (if first time claim, attach T2201 signed by physician).
- T2202 / T2202A - Tuition fees (attach including amounts that can be transferred from dependants) Note: These can be obtained online from most universities and colleges.
- For 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.
- Adoption expenses – new maximum is \$16,563 for each child.
- Home buyers' credit – let us know if you are a first-time home buyer.
- Home Accessibility Tax Credit- age 65 and over or disabled (credit is 15% of eligible expenses up to \$10,000 per year).
- Educator school supplies Tax Credit- provide receipts up to \$1,000 and certification from school authority.

**Client Name** \_\_\_\_\_

- Staycation Credit: January 1, 2022-December 31, 2022 - Accommodation expenses for a leisure stay of less than one month in Ontario; short-term accommodations or camping accommodations. Forwarded receipts must include the following:
  - Location of (Ontario) accommodation
  - Date of stay
  - Payer's name
  - Amount that can be considered reasonable for portion of stay
  - GST-HST amount paid

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**OTHER**

- 2022 Instalments (attach February 2023 notice).  
Total remitted: \$\_\_\_\_\_. March 15, 2023 instalment \$\_\_\_\_\_.
- Attach copy of 2021 Notice of Assessment and any Reassessments or Notices received during the year.
- Amount of any distributions or loans from foreign trusts received in 2022.
- Receipts for property taxes or rent paid in 2022 and name of municipality or landlord, respectively – obtain receipts.
- T10 slip – Pension Adjustment Reversal details.
- Indicate whether you wish to split pension income with spouse to reduce combined income tax:  
YES: \_\_\_\_\_  
NO: \_\_\_\_\_
- Indicate whether you are a U.S. citizen or Green Card holder  
YES: \_\_\_\_\_  
NO: \_\_\_\_\_
- Indicate whether you authorize the CRA to share your name and email address to Ontario Health for the purpose of being contacted by email about organ and tissue donation.  
YES: \_\_\_\_\_  
NO: \_\_\_\_\_  
Email: \_\_\_\_\_

**COMMENTS / NOTES:**

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