



2020 Corporate Tax Questionnaire

1) How would you like to receive the client copy of your return? Paper PDF

2) For new clients, please complete, sign and return the **RC59e Business Consent Authorization** form (page 4).

3) Owner name(s) _____
 Business name _____
 Business address _____
 Telephone number(s) _____
 E-mail address _____
 Business number _____
 GST/HST number (if applicable) _____

4) Please provide paper or PDF/picture copies of all tax slips, including COVID-19 related benefits and/or subsidies, received for the 2020 taxation year (i.e. T3, T5, T4A, etc.). Please also provide the total COVID-19 related benefits, subsidies and/or loans receivable during the 2020 taxation year (CEBA, CEWS, TWS, etc.).

BUSINESS INCOME					
Name of Payor	Amount paid (excluding GST/HST)			GST/HST collected**	
BUSINESS EXPENSES					
	Amount paid (including GST/HST)	GST/HST paid**	Amount paid (including GST/HST)	GST/HST paid**	
Advertising			Cable/streaming services		
Photos			Cellular		
Gifts			Courier/Post		
Meals and entertainment			Professional development		
Business Insurance		N/A	Coaching		
Bank charges		N/A	Books		
Dues and fees			Publications		
Office expenses			CD/DVD/downloads		
Supplies			Theatre tickets		
Accounting			Professional services		
Agent fees			Local transportation		
Business/studio rent			ETR/tolls		
Equipment repairs		N/A	Rental equipment/supplies		
Foreign travel			Theatrical costume		
Travel			Stage cosmetics/hair care		N/A
Accommodation			Health insurance		
Travel meals			Subcontractors		
Telephone					
Internet					

EQUIPMENT PURCHASED		
Description	Amount paid (including GST/HST)	GST/HST paid**

AUTOMOBILE EXPENSES

BUSINESS/STUDIO EXPENSES

Full amount paid (including GST/HST)		GST/HST paid**	Full amount paid (including GST/HST)	
Fuel			Heat	
Car loan interest		N/A	Electricity	
Car insurance		N/A	Insurance	
License and registration		N/A	Maintenance	
Maintenance and repairs			Mortgage interest	
Annual lease payments			Property taxes	
CAA			Utilities (water, garbage)	
Business parking			Rent	
Car make & year of purchase			Condominium fees	
KM used for business			Square footage of home office	
Total KM driven			Total square footage of home	

*If you began leasing a vehicle for business purposes in the 2020 taxation year, please provide a copy of the lease agreement.

**Only GST/HST registrants using the regular method should segment GST/HST paid from expenses. In addition, GST/HST registrants who are unable to determine (based on original receipts/invoices) the GST/HST collected on income and/or paid on expenses should provide all figures inclusive of GST/HST rather than attempt to segment the GST/HST collected on income and/or paid on expenses and we will instead contact you for further details as necessary.

RENTAL INCOME

If you had rental income from any source, please list the rental income and expense as follows:

	1 st Property	2 nd Property
Full Address		
Rental income (gross)	\$	\$
Expenses:		
Advertising	\$	\$
Insurance	\$	\$
Mortgage Interest	\$	\$
Maintenance and repairs	\$	\$
Management and administration fees	\$	\$
Office expenses	\$	\$
Legal, accounting, other professional fees	\$	\$
Property taxes	\$	\$
Utilities (heat, electricity, water)	\$	\$
Condominium fees		
During 2020, did you carry out any major repairs or acquire any furnishings? Specify the nature, date, and amount for each:		

5) Please provide total amount of tax and GST/HST instalments paid to CRA, if any. *Please do not include amounts already reported on tax slips.*

Tax: \$ _____ GST/HST: \$ _____

6) Please provide the following shareholder information:

Name of shareholder(s)	Business number	Social insurance number	Trust number	% of common shares	% of preferred shares

7) Please list all bank account balances as at your corporate year end:

8) Please list all accounts receivable as at your corporate year end:

9) Please list all accounts payable as at your corporate year end:

10) Please provide all corporate broker statements and/or your investment reporting package (i.e. dividend income, interest income, capital gain/loss report, investment advisor fee summary, etc.) received for the taxation year.

ADDITIONAL INFORMATION

CONTACT INFORMATION

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