Kudlow Ye
Professional Corporation
Chartered Professional Accountants

2020 Personal Tax Questionnaire

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

2) For an annual fee of $75, do you wish to be covered under Audit Insurance (see page 5)? **Yes** ☐ **No** ☐

3)

	Taxpayer	**Spouse/Common-law partner**
Name		
Address		
Telephone number(s)		
E-mail address		
Birth Date (mm/dd/yy)		
Citizenship		
SIN (Social Insurance Number)		
Province of residence at year end		
GST/HST Number (if applicable)		

4) For new clients, please complete, sign and return the **Authorize a Representative** form (see page 6). For new clients with a GST/HST number, please complete, sign and return the **RC59e Business Consent Authorization request** form (see page 7).

5) Did your spouse have any income in 2020? **Yes** ☐ **No** ☐
If we are preparing his or her return, please provide details of his or her income in a separate questionnaire.
If we are not preparing his or her return, please provide us with his or her net income for 2020, as indicated on lines 15000 and 23600 of their 2020 personal tax return:

6) Please Indicate your marital status as at December 31, 2020:
If changed from previous year, please indicate date of change:

7) If a Canadian citizen, do you authorize the CRA to provide your name, address, date of birth, and citizenship to Elections Canada to update the National Register of Electors? **Yes** ☐ **No** ☐ **N/A** ☐

8) Dependents:

Name	**Birth Date** (mm/dd/yy)	**SIN**	**Net Income**

9) Please provide total amount of tax and GST/HST instalments paid to CRA, if any. *Please do not include amounts already reported on T4 or T4A slips.*

Tax: $ ______________ GST/HST: $ ______________

BUSINESS OR PROFESSIONAL INCOME AND EXPENSES

BUSINESS INCOME			
	Name of Payor	Amount paid (excluding GST/HST)	GST/HST collected**
Income with T4A slips (please also attach all T4A slips)			
Income *without* T4A slips			
Totals			

BUSINESS EXPENSES					
	Amount paid (including GST/HST)	GST/HST paid**		Amount paid (including GST/HST)	GST/HST paid**
Advertising			Cable		
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			Streaming/online services		
Supplies			Theatre tickets		
Accounting			Local transportation		
Agent fees			ETR/tolls		
Business/studio rent			Rental equipment/supplies		
Equipment repairs			Theatrical costume		
Foreign travel		N/A	Stage cosmetics/hair care		
Travel			Health insurance		N/A
Accommodation			Subcontractors		
Travel meals			Professional services		
Telephone					
Internet					

AUTOMOBILE EXPENSES			HOME OFFICE / 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	

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

*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 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.

EMPLOYMENT EXPENSES

10) Are you claiming the flat rate deduction for home office expenses for the period you worked from home? If yes, please provide the number of days you worked from home: **Yes** ☐ **No** ☐

11) If you are eligible to claim specific employment expenses, summarize your employment expenses in the table below and ensure you retain your signed T2200 or T2200S.

EMPLOYMENT EXPENSES			
	Amount paid (including GST/HST)		**Amount paid** (including GST/HST)
Meals and entertainment		Telephone	
Gifts		Internet	
Supplies		Cable	
Salary paid to an assistant		Cellular	
Office rent		Courier/Post	
Accounting and legal fees		Professional development	
Foreign travel		Equipment repairs	
Travel		Equipment rentals	
Accommodation		Equipment insurance	
Travel meals			
AUTOMOBILE EXPENSES			
	Full amount paid (including GST/HST)		
Fuel		**HOME OFFICE / STUDIO EXPENSES**	
Car loan interest			**Full amount paid**
Car insurance		Utilities (heat, electricity, water, garbage)	
License and registration		Maintenance	
Maintenance and repairs		Insurance	
Annual lease payments*		Property taxes	
CAA		Rent	
Business parking		Condominium fees	
Car make & year of purchase		Other – specify:	
KM used for business		Square footage of home office	
Total KM driven		Total square footage of home	

EQUIPMENT PURCHASED			
Description	**Full amount paid**	**Description**	**Full amount paid**

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

RENTAL INCOME AND EXPENSES

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

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

OTHER INFORMATION

13) 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. T4, T3, T5, T4A, etc.).

14) Did you buy or sell any securities/assets during the year. If yes, please outline the details below and provide a paper or PDF/picture copy of your investment reporting package (i.e. realized gain/loss and investment advisor fee reports).

Name of the security/asset	Prcoeeds of disposition	Adjusted cost base	Other selling expenses
	$	$	$
	$	$	$

15) Did you dispose of a property in 2020 for which you are claiming a principal residence expemption? If yes, please provide a brief description of the use of the property over the years of ownership. We will contact you to discuss further as necessary.

Year of acquisition		Description of use:
Proceeds	$	
Original cost (incl. major renovations)	$	

16) If you attended university, college, or any other post-secondary institution, please attach your tuition receipt form T2202A so that you can claim the tuition tax credit. *Note*: if you have children that are in university, the parent may be able to claim this deduction if the child has low income.

17) If you are paying interest on a student loan, please provide the eligible interest paid in 2020 or the eligible interest paid in the preceding five years if you have not already claimed these amounts.

18) If you made any charitable donations and/or political donations, please provide totals of qualified donation receipts (copies of receipts not required).

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19) Please total all medical expense receipts by individual in your family (actual receipts not required). Total qualified medical receipts:

Individuals Name					
Amount	$	$	$	$	$

20) If you had child care expenses, please provide the name and address of the institution or person providing these services. If the child care expenses are paid to an individual, please obtain their S.I.N.

21) If you are a senior citizen or a caregiver for an elderly parent, please provide a breif description and amount(s) of renovation costs incurred within the year to make the home safer for the senior to be able to continue to live at home:

____

22) Were you a first time home buyer in 2020? **Yes** ☐ **No** ☐

23) Did you make any RRSP contributions? If yes, the related information slip(s) you received from the bank must be attached. Clients which have Home Buyers Plan repayments should provide our office with details concerning required repayments. For new clients, please provide us with RRSP carry forward information as per the most recent assessment notice from CRA.

24) Please provide your total digital news subscription expense incurred in 2020:

25) Please complete the following for the current year Ontario property tax and rent credits:

Home address	# of months in residence	Rent/Property Landlord/Taxes paid	Municipality

26) At any time in 2020, did you own or acquire non-Canadian investment property with a total cost in excess of $100,000? **Yes** ☐ **No** ☐
If you check "yes" to this question, please ensure that you provide us with a year-end reporting package from your broker or the broker contact information so that we can complete the T1135 on your behalf. If you wish to review or complete the form yourself, please go to: http://www.cra-arc.gc.ca/E/pbg/tf/t1135/README.html
IMPORTANT: Failure to complete and file Form T1135 by the due date (April 30 / June 15, 2021) will result in a late filing penalty of $25/day, to a maximum of $2,500.

ADDITIONAL INFORMATION

KUDLOW YE AUDIT INSURANCE PROGRAMME

For a yearly cost of only $75, our firm will handle any Canada Revenue Agency (CRA) income tax or GST/HST audit inquiries for this taxation year and represent you during a tax audit. In addition, in the event that CRA makes any adjustment to your file, we will prepare all necessary appeal documents and represent you up to the completion of the objection stage at no additional cost. If no audit insurance is purchased, all audit services performed by Kudlow Ye will be billed at normal rates. Without audit insurance, the cost of our firm representing a person during a comprehensive tax audit can be in excess of $2,000.

Please note the fee does not cover the creation of the necessary supporting documentation for the audit. We will advise you in detail as to the necessary documentation needed for the audit process. You will be expected to provide us with detailed documentation to substantiate revenue and expense items claimed on your personal returns. To the extent you do not have any documentation, this insurance is null and void. Please also note the fee does not cover any US/IRS audits and enquiries if you had a US filing requirment.

If you are interested, please select 'Yes' under questionnaire item 2 and complete the audit insurance fee form below.

AUDIT INSURANCE FEE FORM

Name		
Method of Payment	**Cheque** ☐ (Please make cheque payable to Kudlow Ye)	**Credit Card** ☐ Credit card #: Expiry date: Security code (CVV on back of card):

CONTACT INFORMATION

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Authorize a Representative – signature page

☒ Enable printing and EFILE of this authorization request

Select "EFILE Authorize a Representative" under the "EFILE" menu to file this authorization.

Instructions:

1. Print this page and have it signed and dated by the taxpayer or legal representative.
2. Retain a copy of the signed and dated signature page in your files for six years from the date that this information is transmitted to the Canada Revenue Agency (CRA). Do not send the signature page to CRA by mail or fax unless requested to do so.

Taxpayer information

SIN	First name	Last name

Representative information and authorization

☐	Individual	Representative ID:	
☒	Business	Firm BN:	864598131
☐	Group	Group ID:	G

Level of authorization (1 or 2): 2

Enter an expiry date, if applicable. ____________

Signature and date

☐ I am the legal representative for this taxpayer.

By signing and dating this page, you authorize the Canada Revenue Agency to interact with the representative mentioned above.

____
Name of taxpayer or legal representative

______________________________ ____________
Signature of taxpayer or legal representative Date of signature

Business Consent Authorization request – signature page

☒ Enable printing and EFILE of this authorization request

Select "EFILE the Business Consent" under the "EFILE" menu to file this authorization.

Instructions:

1. Print this page and have it signed and dated by the authorized person of the business.
2. Retain a copy of the signed and dated authorization request in your files for six years from the date that this information is transmitted to the Canada Revenue Agency (CRA). Do not send the authorization request to CRA by mail or fax unless requested to do so.

I authorize the representative mentioned below:

☐ Individual — Representative ID: ______

☒ Organization — Firm BN: 864598131

☐ Group — Group ID: G

Representative phone number: Country code 001 Area code (416) Telephone number 924-4780 Extension: ______

To represent the following business:

Business name: ______

Business number: ______

Level of Authorization: 02

Expiry date (Optional): ______

List of authorization(s) - If blank, the authorization is for all accounts.

Program Identifier	Reference number

Certification

By signing and dating this page, you authorize the Canada Revenue Agency to interact with the representative mentioned above.

First name: ______ Last name: ______

Signature: ______ Date signed: ______

Telephone number: ( ) -