



2021 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**

	Taxpayer	Spouse/Common-law partner
3) 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 7). For new clients with a GST/HST number, please complete, sign and return the **RC59e Business Consent Authorization request** form (see page 8).

5) Did your spouse have any income in 2021? **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 2021, as indicated on lines 15000 and 23600 of their 2021 personal tax return:

6) Please Indicate your marital status as at December 31, 2021:
 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
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

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 <i>without</i> T4A slips							
Totals							
BUSINESS EXPENSES							
		Amount paid (including GST/HST)	GST/HST paid**			Amount paid (including GST/HST)	GST/HST paid**
Advertising				Cellular			
Photos				Courier/Post			
Gifts				Professional development			
Meals and entertainment				Coaching			
Business Insurance			N/A	Streaming/online services			
Dues and fees				Books			
Office expenses				Publications			
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				Bank charges			N/A
Accommodation				Health insurance			N/A
Travel meals				Subcontractors			
Telephone				Professional services			
Internet							
Cable							
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 2021 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.

EMPLOYMENT EXPENSES

9) 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

10) 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			
Car loan interest			
Car insurance			
License and registration			
Maintenance and repairs			
Annual lease payments*			
CAA			
Business parking			
Car make & year of purchase			
KM used for business			
Total KM driven			
HOME OFFICE / STUDIO EXPENSES			
			Full amount paid
		Utilities (heat, electricity, water, garbage)	
		Maintenance	
		Insurance	
		Property taxes	
		Rent	
		Condominium fees	
		Other – specify:	
		Square footage of home office	
		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 2021 taxation year, please provide a copy of the lease agreement.

RENTAL INCOME AND EXPENSES

11) 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	\$	\$
Property taxes	\$	\$
Utilities (heat, electricity, water)	\$	\$
Other – specify:		
During 2021, did you carry out any major repairs or acquire any furnishings? Specify the nature, date, and amount for each:		

OTHER INFORMATION

12) Please provide paper or PDF/picture copies of all tax slips, including COVID-19 related benefits and/or subsidies, received for the 2021 taxation year (i.e. T4, T3, T5, T4A, etc.).

13) 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	Prcoceeds of disposition	Adjusted cost base	Other selling expenses
	\$	\$	\$
	\$	\$	\$

14) Did you dispose of a property in 2021 for which you are claiming a principal residence exemption? 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)	\$	

15) 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.

16) If you are paying interest on a student loan, please provide the eligible interest paid in 2021 or the eligible interest paid in the preceding five years if you have not already claimed these amounts.

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

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

Individuals Name					
Amount	\$	\$	\$	\$	\$

19) 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.

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

21) If you or a dependant is “markedly restricted” in your daily living activities because of mental or physical impairment, provide a signed form T2201 only if you have not provided the form to the CRA in a prior year.

22) Were you a first time home buyer in 2021? 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 2021:

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 2021, did you own or acquire non-Canadian investment property with a total cost in excess of \$100,000? Yes No

If "yes", please ensure that you provide us with a year-end reporting package from your broker so that we can complete the T1135 on your behalf. Failure to complete and file Form T1135 by the due date (April 30 / June 15, 2022) will result in a late filing penalty of \$25/day, to a maximum of \$2,500.

27) 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: \$ _____

To save you time when gathering information, please do not submit the following information unless requested:

- Duplicate medical or charitable donation receipts
- Personal bank and credit card statements
- Personal registered investments statements (RRSP, RESP, TFSA)
- We scan the information, so please do not staple documents or receipts – thank you!

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 requirement.

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 <input type="checkbox"/>		Credit Card <input type="checkbox"/>
	(Please make cheque payable to Kudlow Ye)		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: () - _____