



## 2023 Corporate Tax Questionnaire

1) How would you like to receive the client copy of your return? Paper  PDF   
*Please note that an administrative charge may be applied if both paper and PDF copies are requested.*

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) \_\_\_\_\_

BUSINESS INCOME		
Name of Payor	Amount paid (excluding GST/HST)	GST/HST collected**
<i>Totals</i>		

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		
Accommodation			Health insurance		N/A
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 2023 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 <sup>st</sup> Property	2 <sup>nd</sup> 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 2023, did you carry out any major repairs or acquire any furnishings? Specify the nature, date, and amount for each:		

1) Please advise if corporation owns residential property in Canada through a trust or partnership and require our assistance to file the Underused Housing Tax (UHT) return **\*new\*** Yes  No

2) 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: \$ \_\_\_\_\_

3) Please provide the following shareholder information:

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

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

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5) Please list all accounts receivable (i.e. revenue earned but not collected) as at your corporate year end:

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6) Please list all accounts payable (i.e. expenses incurred but not paid) as at your corporate year end:

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7) Please list the outstanding balance of the CEBA loan as at your corporate year end, if applicable.

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8) 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.

9) At any time in 2023, 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, 2023) will result in a late filing penalty of \$25/day, to a maximum of \$24,000 plus 5% of the value of the property if CRA determines that this was done knowingly or under circumstances amounting to gross negligence.

10) At any time in 2023, did you own or acquire an incorporated entity registered in a foreign jurisdiction? Yes  No

If "yes", please provide us with the financial statements and identification documents so that we can complete the T1134 on your behalf. Failure to complete and file Form T1134 on a timely basis will result in a late filing penalty of \$25/day, to a maximum of \$24,000 plus 5% of the value of the property if CRA determines that this was done knowingly or under circumstances amounting to gross negligence.

### ADDITIONAL INFORMATION

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*We strongly encourage you to contact CRA directly at 1-800-959-8281 for individuals and 1-800-959-5525 for businesses should you require assistance navigating your online CRA account(s); it is a free service. Please note that an administrative charge may be applied if you request that we access and review your online CRA account(s) and records on your behalf.*

### CONTACT INFORMATION

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