



## 2023 Personal 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 an annual fee of \$80, 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 2023? 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 2023, as indicated on lines 15000 and 23600 of their 2023 personal tax return:

6) Please Indicate your marital status as at December 31, 2023:  
 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**

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

<b>BUSINESS EXPENSES</b>							
		<b>Amount paid (including GST/HST)</b>	<b>GST/HST paid**</b>			<b>Amount paid (including GST/HST)</b>	<b>GST/HST paid**</b>
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							

<b>AUTOMOBILE EXPENSES</b>			<b>HOME OFFICE / STUDIO EXPENSES</b>			
		<b>Full amount paid (including GST/HST)</b>	<b>GST/HST paid**</b>			<b>Full amount paid (including GST/HST)</b>
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		

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

\*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.

## EMPLOYMENT EXPENSES

- 9) 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.

<b>EMPLOYMENT EXPENSES</b>			
	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			
<b>AUTOMOBILE EXPENSES</b>			
	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			
<b>HOME OFFICE / STUDIO EXPENSES</b>			
			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	
<b>EQUIPMENT PURCHASED</b>			
Description	Full amount paid	Description	Full amount paid

\*If you began leasing a vehicle for business purposes in the 2023 taxation year, please provide a copy of the lease agreement.

## RENTAL INCOME AND EXPENSES

- 10) 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	\$	\$
Property taxes	\$	\$
Utilities (heat, electricity, water)	\$	\$
Other – specify:		
During 2023, did you carry out any major repairs or acquire any furnishings? Specify the nature, date, and amount for each:		

**OTHER INFORMATION**

11) Please provide paper or PDF/picture copies of all tax slips, including COVID-19 related benefits/subsidies/repayments, received for the 2023 taxation year (i.e. T4, T3, T5, T4A, etc.).

12) 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	Proceeds of disposition	Adjusted cost base	Other selling expenses
	\$	\$	\$
	\$	\$	\$

13) Did you dispose of a property in 2023 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.

<b>Year of acquisition</b>		Description of use:
<b>Proceeds</b>	\$	
<b>Original cost (incl. major renovations)</b>	\$	

14) 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.

15) If you are paying interest on a student loan, please provide the eligible interest paid in 2023 or the eligible interest paid in the preceding five years if you have not already claimed these amounts: \_\_\_\_\_

16) If you made any charitable donations and/or political donations, please provide totals of qualified donation receipts (we do not require the receipt for our records but these should be kept by you).

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

Individuals Name					
<b>Amount</b>	\$	\$	\$	\$	\$

18) 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.

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19) 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:

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20) 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.

21) Were you a first time home buyer in 2023? Yes  No

22) Did you make any RRSP and/or First Home Savings Account (FHSA) contributions? If yes, the related information slip(s) you received from the bank must be attached. Clients which have Home Buyers Plan and/or FHSA 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.

23) Please provide your total digital news subscription expense incurred in 2023:

24) 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

25) 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.

26) 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.

27) Please advise if you own residential property in Canada in a partnership or in trust for another individual or your spouse, or if you on title for a residential property other than your primary residence and require our assistance to file the Underused Housing Tax (UHT) return. Yes  No

28) 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 any physical documents provided – thank you!

**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.*

## KUDLOW YE AUDIT INSURANCE PROGRAMME

For a yearly cost of only \$80, 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 \$2,500.

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

<b>Name</b>			
<b>Method of Payment</b>	<b>Cheque</b> <input type="checkbox"/>		<b>Credit Card</b> <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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