

2011 PERSONAL TAX QUESTIONNAIRE/CHECKLIST

Name:		
Current Address:		
City:	Province:	Postal Code:
Telephone #'s: Home:	Work :	Cell:
Email Address:		

Check when done	<u>QUESTIONS:</u>	Yes or No	<u>If you answer YES, we need this information:</u>
	Marital Status at Dec 31, 2011 - circle one Married Common-Law Separated Divorced Widowed Single		Spouse's/Partner's Name: _____ Birth date: _____ S.I.N.: _____ Net income from Line 236 of his/her 2011 tax return: \$ _____
	Did your marital status change at any time in 2011?		Date of Marital Status change:
	Do you have children under the age of 19 and were they living with you? <i>We need the names and dates of birth for each child. Don't forget to add any child born after the date of bankruptcy.</i> What was your child's net income for 2011? The Trustee will be making the dependant claim for all children.		Name: _____ Birth date: _____ Net Income: Nil ____ or \$ _____ Name: _____ Birth date: _____ Net Income: Nil ____ or \$ _____
	Did you have at any time in 2011 a parent(s) living with you who was 65 years of age or older?		Name: _____ Birth date: _____ Net Income: _____
	Were you employed by anyone in 2011?		T4 slip or T4A slip from all employers.
	Did you receive Old Age Security, Canada Pension Plan benefits, AB Seniors benefits or other pension income such as a foreign pension?		T4A (OAS), T4A (P), T4A, and T 5007 AB Senior's Benefit - slips for each source of benefits. Country for Foreign pension? _____ Amount of Foreign (CDN \$): _____
	Did you receive Universal Child Care Benefits?		UCCB form RC62

Check when done	<u>QUESTIONS:</u>	Yes or No	<u>If you answer YES, we need this information:</u>
	Did you receive Employment Insurance (EI) benefits?		T4E slip(s).
	Did you withdraw funds from an RRSP? 1) For cash only ? 2) Home Buyers Plan or Lifelong Learning Plan in 2011 or any previous year?		Details of withdrawal(s): 1) Cash – T4RSP is this for pre or post period or both. 2) HBP & LLP include amounts and dates and copy of last year’s Notice of Assessment with indication of payments required.
	Did you receive any self-employed income in 2011 ?		Contact our office for the Business Income & Expense summary form to complete or go to our website to access the form www.solvingdebt.ca
	Did you have a rental property in 2011 ?		Contact our office for the Rental Income & Expense statement form to be completed or go to our website to access the form www.solvingdebt.ca
	Have you made any instalment payments for 2011 ?		We require a copy of the CRA instalment statement for December 31, 2011
	Did you make contributions to an RRSP?		RRSP receipts – must state “official tax receipt” to be accepted. We need copy of last filed Notice of Assessment.
	Did you incur child care expenses such as day care or summer camp?		ALL day care or camp receipts are required. If an individual is providing the care giving, <u>THEY MUST PROVIDE THEIR SIN</u> or the expense will not be claimed. Amount, name, S.I.N. and address of individual caregiver.
	Did you incur any expenses for fitness programs for your children?		Receipts from the program.
	Did you move your residence at least 40 km closer to work?		Receipts for Movers or Rental used for moving. Contact our office for the Moving Expense statement form to be completed or go to our website to access the form www.solvingdebt.ca
	Do you have a Court Order, judgement or written agreement for spousal or child support?		MUST provide a copy of Court Order, Judgement or Written Agreement, along with any subsequent revisions.

Check when done	<u>QUESTIONS:</u>	Yes or No	<u>If you answer YES, we need this information:</u>
	Spousal support?		Spousal support Received: _____ Spousal support Paid: _____ Proof of payment is required. ie: MEP statement, letter from recipient with Name, address, and S.I.N. or receipts or cancelled cheque (front and back)
	Child support?		Child support Received: _____ Child support Paid: _____ Proof of payment is required. ie: MEP statement, letter from recipient with Name, address, and S.I.N. or receipts or cancelled cheque (front and back)
	Are you current with child support payments?		If no, what is the arrears amount? \$ _____
	Were you required to incur employment expenses (e.g. auto expenses, expenses to earn a commission) for which you were not reimbursed by your employer?		Provide form T2200 completed by your employer or go to our website to access the form www.solvingdebt.ca. Include the number of personal and business km driven. Provide form T777 Employment expenses & Auto expenses or go to our website to access the form www.solvingdebt.ca
	Were you employed as a long haul truck driver away from your home terminal more than 24 consecutive hours?		Provide TL2 completed by your employer along with your summary of days/trips, average hours per trip and \$ of meals bought or go to our website to access the form www.solvingdebt.ca
	Did you spend more than \$100.01 on tuition at any post-secondary educational institution?		Educational Institution receipt or T2202A Tuition document is required. Educational Institutions provide T2202A receipts on line only during tax season.
	Do you have Tuition, Education, & Textbook amount carry forwards from prior years?		Call Canada Revenue Agency 1 800 959 8281 to obtain carry forward amounts Federally & Provincially or provide a copy of last year's Notice of Assessment
	Is your child or spouse/partner transferring Tuition & Education amounts to you?		Provide the signed and completed Transfer section from the student's T2202A (copy 2).
	Did you incur medical expenses?		Receipts or Pharmacy printout (preferred). We will not retrieve receipts from your monthly income and expense statements.

Check when done	<u>QUESTIONS:</u>	Yes or No	<u>If you answer YES, we need this information:</u>
	Are you, your spouse or your child eligible for the Disability Tax Credit for tax purposes?		Provide a copy of the T2201 and/or the details of who is disabled and what is the disability. T2201 may be accessed at www.solvingdebt.ca.
	Did you use public transit in 2011?		Monthly transit passes receipts or passes are required
	Did you receive any other income not covered by the above questions? (e.g. tips, gratuities, training allowance, social assistance, workers compensation).		T5007 Social Assistance or Workman's Compensation slip. <i>Although this income is non taxable it is reportable for the calculation of benefits.</i> Details and any support documentation for any other income.
	Did you make any repayments to EI or Universal Child Care Benefits?		Details required <i>Official tax receipts issued by CRA</i>

PLEASE BE CERTAIN ALL INFORMATION AND DOCUMENTATION IS SENT ALL TOGETHER AT ONE TIME.

We prefer this checklist and all supporting T Slips and documentation be:

Photocopied and faxed to: 403-266-5073 Calgary }
403-320-7999 Lethbridge } Attention: Tax Department
403-526-3624 Medicine Hat }

Or Scanned and emailed to:
Taxes@BromwichSmith.com Subject Line: Your name 2011 tax information

Or, if necessary, direct all mail to:
Bromwich & Smith Inc.
201, 1000 – 9 Avenue S.W.
Calgary, AB T2P 2Y6

If you have any questions contact Norine or Jenny at (403) 705-3509 or Taxes@BromwichSmith.com

Signature – _____
Bankrupt