

MTC Client Questionnaire

Background and Filing status

1. Full name (Valid Government Issued ID)
2. Date of birth (Birth Certificate of Dependents)
3. Best Contact Number
4. Email Address
5. Mailing Address (if different from home address)
6. New or Returning Client?
7. Are you married and filing with your spouse? If yes, spouse information is required
8. Do you have any dependents? If yes, dependent information, relationship to dependent, how long they were a dependent

Tax Filing Preferences & Bank Information

9. Preferred method of contact (*phone/email*)
10. Preferred time of day for contact (*morning/afternoon/evening*)
11. Please provide bank information below:
 - ☐ **Bank name**
 - ☐ **Routing number**
 - ☐ **Account number**
 - ☐ **Account type**

Tax Return Information

12. Has your personal information changed in the last year? (Address, marital status, kids etc.) if so, please provide full details
13. How many tax years are we filing for? (2021, 2022, 2023, 2024)
14. Did you open a FHSA this year? (First Home Savings Account)
15. Did you own foreign property at any time during the tax year where the total value of the property exceeded \$100,000 CAD? (This includes foreign shares held in Canadian trading accounts)
16. Did you or your spouse (or partner) purchase a home during the tax year?
17. Did you sell your principal residence during the tax year?
18. Did you and/or your spouse (or partner) pay property taxes and/or rent?
19. Did you work from home during the tax year?

Sources of income

20. What were your sources of income for the tax year?

- ☐ ***Wages (W-2)***
- ☐ ***Foreign income***
- ☐ ***Gambling income***
- ☐ ***Interest***
- ☐ ***Dividends***
- ☐ ***Stock/asset sales***
- ☐ ***RRSP income***
- ☐ ***Disability***
- ☐ ***Government income***
- ☐ ***Scholarships and bursaries***
- ☐ ***Rental income***
- ☐ ***Spousal support***
- ☐ ***Self-employment income (Need 1099 or Profit & Loss Statement)***

Deductible expenses

21. Please check the applicable deductions for the tax year (multiple options)

- ☐ ***I opened/contributed to a first-time home savings account in the tax year***
- ☐ ***I worked from home in some or all of the tax year***
- ☐ ***I bought my first home in the tax year***
- ☐ ***I had a staycation credit***
- ☐ ***Medical expenses***
- ☐ ***Charitable contributions***
- ☐ ***Property taxes/rent paid***
- ☐ ***Student loan interest***
- ☐ ***Educator expenses***
- ☐ ***Retirement contributions***
- ☐ ***Tuition fees***
- ☐ ***Childcare expenses***
- ☐ ***Employment-related expenses***
- ☐ ***Professional /union dues***
- ☐ ***Spousal support paid***
- ☐ ***Investment carrying charges***

- ☐ *Legal fees related to employment*
- ☐ *Notice of assessment from the previous year*
- ☐ *Home buyer's plan*
- ☐ *Life-long learner's plan*
- ☐ *No deductions*

Childcare expenses

22. Did you pay any childcare expenses for any dependents being claimed? If yes, please provide form 2441 (Child and Dependent Care Expenses). If your child attended a private daycare please provide the following information:
- ☐ **Name & Date of birth of childcare provider**
 - ☐ **Social security number of child care provider**
 - ☐ **Amount paid to childcare provider**
23. Did you, your spouse, or any dependents attend college in the tax year?
24. Did the student attend college at least half-time?

Business Information (if self-employed)

25. Do you have an operating name for your business? If yes, please provide name
26. Please provide EIN for business (if applicable)
27. Please provide business start date
28. Please provide clear details on the services or products you provide.
29. Do you run your business out of your home?
30. What percentage of your home are you taking up for your business?
31. Do you have a Profit & Loss Statement to provide for business income and expenses? If no, see next question

Business Expenses (General)

32. Please provide the amount for each of the following during the tax year (if applicable):
- ☐ **Advertising**
 - ☐ **Meals and entertainment**
 - ☐ **Insurance**
 - ☐ **Interest**
 - ☐ **Business tax, fees, licenses, dues, memberships, and subscriptions**
 - ☐ **Office expenses**
 - ☐ **Supplies**

- ☐ Legal, accounting, and other professional fees
- ☐ Management and administration Fees
- ☐ Rent (storefront or office, not home rent)
- ☐ Maintenance and repairs
- ☐ Salaries, wages, and benefits
- ☐ Property taxes
- ☐ Travel (excluding automobile expenses) hotels, flights, taxis, Ubers
- ☐ Telephone and utilities
- ☐ Delivery, freight, and express
- ☐ Health insurance
- ☐ Royalties
- ☐ Subcontractor wages
- ☐ Any other business expenses not listed above

Business expenses (automobile)

33. Please provide the amount for each of the following during the tax year (if applicable):

- ☐ *Year, make and model of vehicle*
- ☐ *Total Business Miles driver for the year? Do you have proof of mileage? Is it written?*
- ☐ *Fuel and oil expenses*
- ☐ *Repairs and maintenance expenses (including car washes)*
- ☐ *Parking expenses*
- ☐ *Insurance expenses*
- ☐ *License and registration fees*
- ☐ *If you own, interest for the year*
- ☐ *If you lease, lease costs for the year*
- ☐ *Car rental expenses*

Business Expenses (Home Office)

34. Complete this only if this is where you do the majority of your business. Enter the amount spent on each of the following during the tax year:

- ☐ ***Square footage dedicated for office***
- ☐ ***Total square footage of home***
- ☐ ***Interest on your mortgage***
- ☐ ***Heat***
- ☐ ***Electricity***
- ☐ ***Water***
- ☐ ***Gas***
- ☐ ***Insurance***
- ☐ ***Maintenance***
- ☐ ***Property taxes***
- ☐ ***Condo fees***
- ☐ ***Rent***
- ☐ ***Other expenses***

Document Upload and Additional Information

35. Upload any supporting documentation to our Mobile App/Client Portal (relevant photos/documents/scans or other relevant information). The link will be provided by the Tax Professional
36. Please feel free to provide us with any additional information that could help us complete your tax return