



Personal Income Tax Questionnaire

We have compiled the following list of questions in order to assist us in preparing your personal tax return. Please read and carefully answer each question below:

1. Please provide us with the most up to date information as listed below:

- a. Full legal name: _____
- b. SIN: _____
- c. Gender: _____
- d. Mailing address: _____

- e. Date of birth: _____
- f. Email address: _____
- g. Home phone #: _____
- h. Cell/work phone #: _____
- i. Preferred method of contact: home phone cell/work phone email

2. Are you a **Canadian citizen**? Yes No

Would you like your information provided to **Elections Canada**? Yes No

3. Did you own **foreign property** at any time in the year with a total combined original cost of more than \$100,000? Yes No

4. At December 31st of the current tax year, were you:

- | | |
|-------------------------------------|------------------------------------|
| <input type="checkbox"/> Single | <input type="checkbox"/> Separated |
| <input type="checkbox"/> Common law | <input type="checkbox"/> Divorced |
| <input type="checkbox"/> Married | <input type="checkbox"/> Widowed |

If you are married or common law and we are **not** preparing your spouse's tax return, please provide:

- a. Spouse's full legal name: _____
- b. Spouse's date of birth: _____
- c. Spouse's SIN #: _____
- d. Spouse's Gender: _____

Spouse's taxable income for the current tax year:



5. Do you have any **children under the age of 18** that live with you?

Yes No if yes, please fill out their details in the chart below

If yes, please fill out their details in the chart below:

First name				
Last name				
Gender				
SIN				
Date of birth				
Is the dependent disabled or infirm?				
Was the dependent in child care during the year?				

6. Please answer all the questions below. For those you answer yes, please provide us with the slips or details so we may record it appropriately.

- a. Did you make any **RRSP** contributions for the current tax year? Yes No
- b. Did you make any **charitable or political donations** in the year? Yes No
- c. Are there **medical** expenses you have paid in the year for you or a dependent? Yes No
- d. Did you pay or receive any **alimony and/or spousal support**? Yes No
- e. Did you or any of your dependents attend a **post-secondary institution**? Yes No
- f. Did you pay any **union/professional dues** that are not reported on your T4? Yes No
- g. Did you pay any **student loan interest**? Yes No

7. Did you **move** in the current year? Yes No

8. Do you hold any **investments** outside TFSA, RRSP, or RESP? Yes No

9. Did you sell any **real estate** (principle residence) or other investment assets in the year? Yes No

10. Do you have any **rental properties** that you hold personally? Yes No

11. Do you have **self-employment** income (not in a corporation)? Yes No

12. Do you or any of your dependents have a **disability**? Yes No

13. Are you a **first-time home buyer** in current year? Yes No